

**Oracle® TeleSales**

User Guide

Release 12

**Part No. B25229-01**

December 2006

Oracle TeleSales User Guide, Release 12

Part No. B25229-01

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## Oracle TeleSales User Guide, Release 12

### Part No. B25229-01

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# Preface

## Intended Audience

Welcome to Release 12 of the *Oracle TeleSales User Guide*.

this document is intended for telesales agents and their managers.

This guide assumes that you have a working knowledge of the following:

- The principles and customary practices of your business area
- The Oracle TeleSales application
- Oracle Forms Applications

To learn more about Oracle Forms Applications, read the *Oracle Applications User Interface Standards for Forms-Based Products* guide.

- The Oracle Applications graphical user interface

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Related Information Sources on page xii for more Oracle Applications product information.

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## Structure

- 1 Introduction to Oracle TeleSales
- 2 Oracle TeleSales Business User Flows
- 3 Performing Searches
- 4 Maintaining Customer Information
- 5 Recording Customer Relationships
- 6 Working with Leads
- 7 Tracking Opportunities
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- 11 Enrolling in Marketing Events
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## Related Information Sources

*Oracle Advanced Collections User Guide*

Refer to this guide for information on the Collections tab in the eBusiness Center.

*Oracle Marketing User Guide*

Refer to this guide for more information about marketing events.

#### *Oracle Order Management User's Guide*

Telesales agents can create and view orders from the eBusiness Center. Refer to this guide for information about creating and managing customer orders.

#### *Oracle Proposals User Guide*

Agents can create proposals while viewing an opportunity in the eBusiness Center. See this guide for information on how to create a proposal.

#### *Oracle Sales User Guide*

Refer to this guide for information about reports.

#### *Oracle TeleSales Implementation Guide*

This guide explains how to implement the features of Oracle TeleSales. Many of the procedures and explanations in this guide can be used to administer the application after the product is implemented.

#### *Oracle TeleService User Guide*

Refer to this guide for information about creating service requests.

## **Integration Repository**

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## **Do Not Use Database Tools to Modify Oracle Applications Data**

Oracle **STRONGLY RECOMMENDS** that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information

and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

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# Introduction to Oracle TeleSales

This chapter covers the following topics:

- Overview of Oracle TeleSales
- Oracle TeleSales Key Features
- Oracle TeleSales Integrations
- Accessing the Oracle TeleSales eBusiness Center
- Accessing Leads, Opportunities, and Other Work from Your Work Queue
- Working with Multi-Organization Access
- Accessing Reports
- The eBusiness Center

## Overview of Oracle TeleSales

Oracle TeleSales is an application designed for telesales agents, and provides a set of tools to manage the sales cycle, from prospects to booked orders. The E-Business Center within Oracle TeleSales offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for an comprehensive customer view. Oracle TeleSales is part of the Oracle E-Business Suite, an integrated set of applications.

You use four main windows to do most of your work in Oracle TeleSales. These windows can be launched from the Navigator:

- Universal Work Queue

Use this window to display a list of your open leads, opportunities, quotes, marketing lists, and daily tasks. You can perform tasks in the Action section of the window, such as updating an opportunity. The work queue also serves as an access point for the rest of the application. Select a lead you want to view and edit, for example, click the Get Work button, and the lead opens up in the Lead Center window.

- **eBusiness Center**

Use as the central work area for Oracle TeleSales when you are on the phone with your customer.

Use it to create and manage customer records, to send out collateral, enroll your customers in events, and launch the Oracle Quoting - Forms or Oracle Order Management windows to prepare quotes and orders.

The eBusiness Center also enables you to quickly enter basic information for leads and opportunities.
- **Lead Center**

Use the Lead Center to manage the details of a specific lead. You can use this window to create new leads or to add more detail to leads you have created using the eBusiness Center.
- **Opportunity Center**

Use the Opportunity Center to create and manage individual opportunities until they close. This includes managing the sales team and partners for the opportunity. You can use this window for such tasks as entering purchase interests, forecast dates, partners, and sales credits for the sales team and any partners for the opportunity.

## Oracle TeleSales Key Features

Oracle TeleSales includes the following key features:

- Customer Management
- Lead Management
- Opportunity Management
- Proposal Management
- Event Registration and Collateral Fulfillment
- Forecast Management
- Quote and Order Management
- Inbound and Outbound Calling through CTI
- Personal Productivity using Calendar, Notes, and Tasks
- Sales Contact Management



- Service Management
- Install Base Management
- Collections Management

## Oracle TeleSales Integrations

Oracle TeleSales integrates with the following modules:

### **Oracle Collections**

The eBusiness Center provides a view of delinquency information and the ability to open the Collections window to view details.

### **Oracle Contracts**

The eBusiness Center provides a view of contract information and a drill down to a contract.

### **Oracle Install Base**

Oracle Install Base provides install base information for the party in the eBusiness Center.

### **Oracle Interaction Center**

Oracle Interaction Center provides inbound and outbound call routing, predictive dialing, work queue, and call scripting functionality.

### **Oracle iStore**

Oracle iStore provides interactive selling on the web.

### **Oracle Marketing**

Oracle Marketing provides a true closed-loop marketing solution from campaign to cash. It is also needed for event registration and collateral fulfillment.

### **Oracle Order Management**

Oracle Order Management provides the ability to view existing orders and create new orders.

### **Oracle Quoting**

Oracle Quoting provides the ability to create quotes.

### **Oracle Proposals**

Oracle Proposals provides the ability to create quotes.

### **Oracle Sales**

Oracle Sales provides visibility into the sales cycle, enabling sales representatives to manage effective selling activities.

### **Oracle TeleService**

Oracle TeleService provides service request management for resolving customer issues. It enables agents to receive automatic alerts about customers through the use of Relationship Plans. Using this functionality, the eBusiness Center provides a view of a party's service requests and the ability to view details for a service request.

### **Oracle Receivables**

Oracle Receivables manages day-to-day Accounts Receivable operations, including receipt-related tasks, invoices, debit memos, credit memos, on-account credits, chargebacks, adjustments, collections, and bills receivable.

### **Oracle Territory Manager**

Oracle Territory Management assigns business objects (customers, opportunities, and leads, for example) to resources based on configured business rules.

### **Oracle Trading Community Architecture**

Oracle Trading Community Architecture (TCA) is a data model that enables the management of information about the parties, or customers, who belong to the commercial community, including organizations, locations, and the network of hierarchical relationships among them.

## **Accessing the Oracle TeleSales eBusiness Center**

The eBusiness Center is your central work area.

Responsibilities enable you to access more than one operating unit at a time, so you can perform business tasks for entities across all accessible operating units while logged in under a single given responsibility. This enables you to perform tasks for any of the operating units to which you have access, such adding products to a lead or an opportunity.

### **Responsibility**

TeleSales Agent

TeleSales Manager

Telemarketing Agent

### **Steps:**

1. In the Navigator, choose **eBusiness Center**.

The eBusiness Center displays, or the Choose Role and Group window can display. Choose your role from the LOV if necessary.

2. If your role type is TeleSales, Sales or Partner Relationship Management, then choose your sales-related group from the LOV. If you are accessing the eBusiness Center as a salesperson, then your sales group usages must include *Sales* or *TeleSales*

Only users who are members of a sales group are able to create leads and opportunities. Non-sales users can create and update customer records.

## Accessing Leads, Opportunities, and Other Work from Your Work Queue

Responsibilities enable you to access more than one operating unit at a time, so you can perform business tasks for entities across all accessible operating units while logged in under a single given responsibility. This enables you to perform tasks for any of the operating units to which you have access, such adding products to a lead or an opportunity.

Use this procedure to access work assigned to you from your work queue. There are two Universal Work Queue windows available, one with the queue listed on one side of the window, and the other with the choices in a cascading menu. For more information about using the work queue, see *Oracle Universal Work Queue* documentation.

### Responsibility

TeleSales Agent

TeleSales Manager

Telemarketing Agent

### Steps:

1. Choose Universal Work Queue from the Navigator or click the Work Queue button from the toolbar. The button shows an icon of a miniature wall calendar.

The Universal Work Queue window appears.

2. Select the category of tasks you want to view. For example, selecting My Leads (Owner) displays all leads you own in a list.
3. Click one or more items and the work panel changes according to what you selected.
4. Double-click an item you want to work on or select it and click the Get Work icon.  
The item launches in the appropriate section of the application.  
For example, double-clicking a lead launches that lead in the Lead Center.

## Working with Multi-Organization Access

If your business has more than one operating unit or organization, responsibilities enable you to access more than one operating unit at a time. This means that you can access multiple operating units while logged in under a single responsibility. This

enables you to perform many business tasks (such as adding products to leads or opportunities) across any of the operating units to which you have access.

In Oracle TeleSales, multi-organization access enables you to perform the following:

- Add products that belong to accessible operating units to leads and opportunities.
- List all quotes in the At a Glance window and Universal Work Queue, and access details of quotes that belong to all operating units to which you have access.
- Search for quotes by operating unit. Also, the ability to view lists of all quotes and orders in search results, and view details of the quotes and orders as restricted by accessible operating units. Search results for collateral are fully restricted by accessible operating units.
- List all quotes and orders in the eBusiness Center Dashboard, and access details of quotes and orders that belong to accessible operating units.
- Send collateral items belonging to all accessible operating units.
- Enroll customers in events with collateral belonging to any of your accessible operating units.
- View account sites and account relationships across all accessible operating units.
- View orders across all accessible operating units.
- View collections across all accessible operating units.
- View lists of all sales contracts, blanket sales agreements, and service contracts, and access details of only those contracts that belong to accessible operating units.
- View lease contracts restricted by accessible operating units.
- View Universal Search results for all operating units for orders and quotes, with display of details restricted based on access.

Your system administrator will perform internal settings that affect new account sites and new account relationships. If you attempt to create a new account site or a new account relationship and these internal settings have not been made, you will receive these error messages and should contact your system administrator:

For account site:

*You will not be able to create the Account Site since your default operating unit has not been set or has been set to a value that is not valid. Please contact your System Administrator.*

For account relationship:

*You will not be able to create the Account Relationship since your default operating unit has not been set or has been set to a value that is not valid. Please contact your System Administrator.*

System settings can also affect event collateral in the multi-operating unit environment. Contact your system administrator if you get this error message when attempting to select event collateral:

*The collateral associated with the selected event does not belong to your accessible operating unit(s). Please select a different event.*

## Accessing Reports

You can launch reports directly from the Navigator. The reports open in a separate window. See *Oracle Sales User Guide* for more information.

## The eBusiness Center

The eBusiness Center is divided into four functional areas:

### 1. Header

The header displays basic customer information. Although you can enter basic information about the party here, most of the entries are done in the tabs.

The Party Type drop-down list determines what type of customer information you can view and enter.

The Next Call icon ends your interaction and wrap-up automatically using default values and takes your next call.

### 2. Profile

This region, located to the right of the header, gives key information about the organization, consumer, or organizational contact you select using the View Details drop-down list. The information in the Profile region comes from the tabs. This region is folder-enabled. This means that you can customize the presentation of data using standard Oracle Folder tools.

### 3. View Details Drop-Down List

Selecting one of the items in the list determines what information appears in the tabs. For example, if you select the name of the person and enter a phone number in the Address/Phone tab, then this phone number is stored in the database linked to the party of Person (consumer).

If you enter the same phone number after selecting the name of the person and the organization, then this number is linked to the Party Relationship party in the database and is not visible when you are looking at the phone numbers for the party of Person.

The account that appears in View Details is the account selected in the header.

For example, if the header displays information on Jack Jones, the purchasing manager for the ABC Company, then the list contains the party types you can view

and edit using the tabs:

You can select:

- **Jack Jones:** To enter and view information that pertains to Jack Jones, the party type Person. This includes all personal information as well as any purchases he makes as a consumer.
- **ABC Company:** To enter and view all information about the ABC Company, the party type organization. This includes organizational details as well as all leads, opportunities, quotes, and orders. Leads, quotes, and orders are tied to the organization and not the contact.
- **Jack Jones -- ABC Company:** To view and enter phone numbers, addresses and other information for Jack Jones when he acts in his capacity as employee of the ABC Company (party type of Party Relationship).
- **ABC Company -- 1000:** To view interactions for the party owning the account.

#### 4. **Tabs for Entering Transactions and Details About the Customer**

Use the tabs to enter and manage detailed information on the customer displayed in the header. How the information you enter here is stored in the database depends on the View Details choice you selected.

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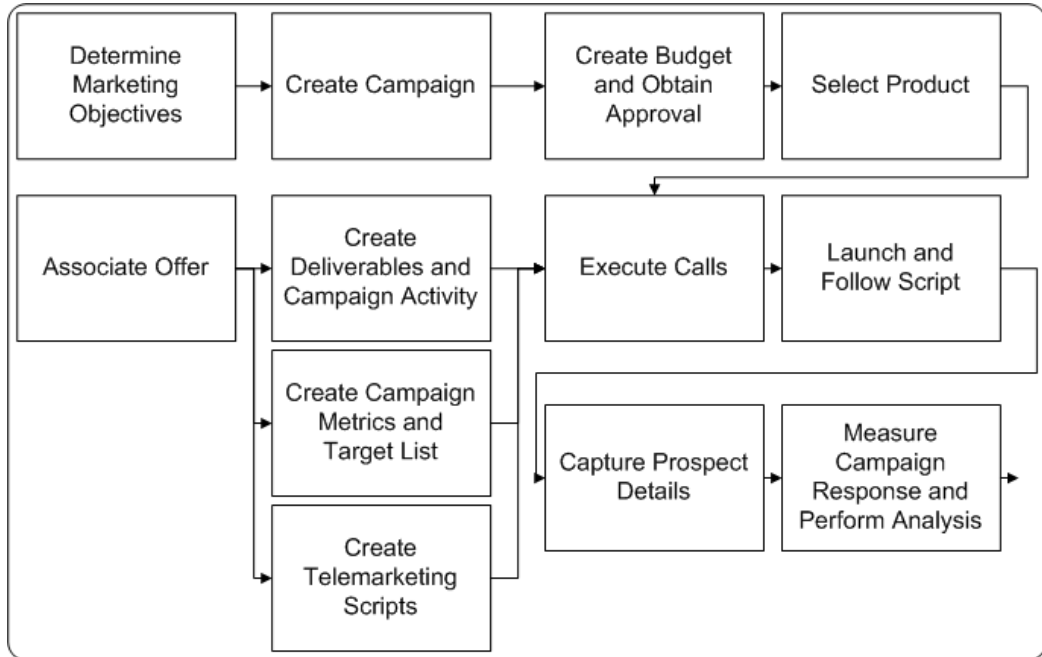
## Oracle TeleSales Business User Flows

This chapter covers the following topics:

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- Process Flow for Opportunity to Order
- Process Flow for Product Trade-in to Order

### Process flow to Create and Implement a Telemarketing Campaign

The following chart shows the creation and implementation of a telemarketing campaign.



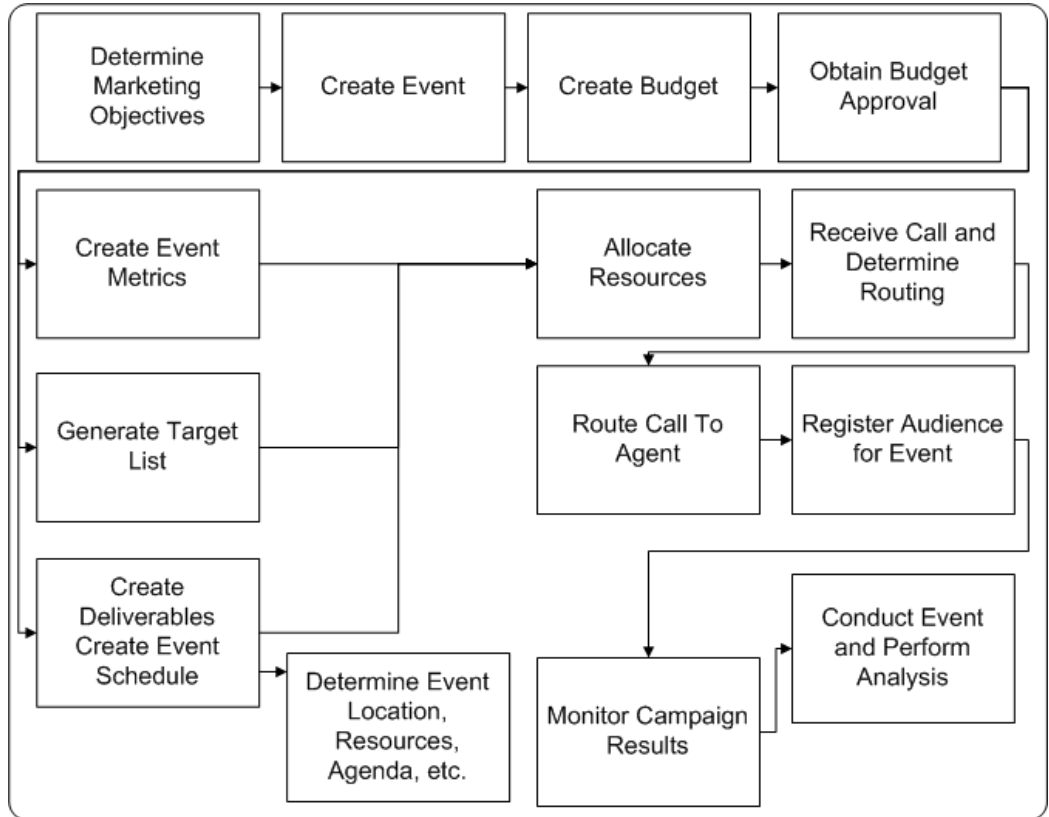
A marketing campaign is created to meet specific marketing objectives. The budget for the campaign is created and approved, and the products for the campaign are selected. An offer is associated with the campaign and deliverables and campaign activity are created. Metrics for measuring the campaign are determined and a target list is created. Telemarketing scripts can be used with the campaign.

When all the pieces of the campaign are ready the telemarketers execute the calls and follow the script. They capture the details for prospects. At the end of the campaign, Marketing measures and analyzes the success of the campaign.

## Process Flow to Create and Conduct a Marketing Event

The following chart shows creating a marketing event and the telesales agent registering a customer for the event.

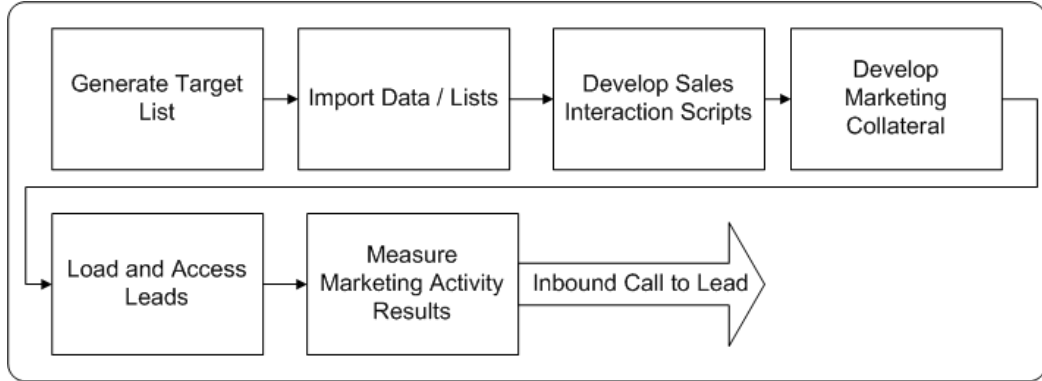




The marketing event is created to meet specified marketing objectives. The event includes an approved budget, metrics for measuring its success, and a target list. There are deliverables for the event and it is scheduled including location, resources, agenda, and so on. The designated telemarketing resources receive calls and register people for the event. Marketing monitors the campaign for results, the event is held, and Marketing analyzes the metrics.

## Process Flow for Campaign to TeleSales

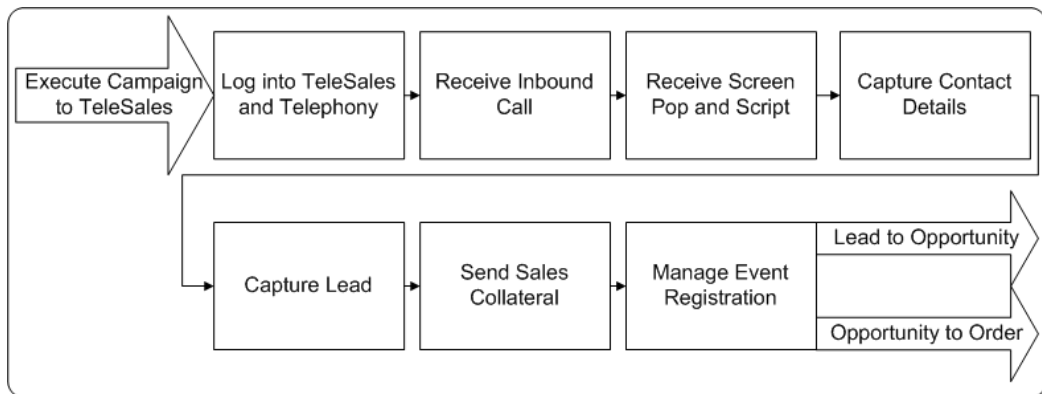
The following chart shows a marketing campaign conducted through TeleSales.



Marketing generates a target list that is then imported into Oracle TeleSales. Scripts and collateral are readied and leads loaded into Oracle TeleSales. The marketing activity is measured. The Inbound Call to Lead flow follows.

## Process Flow for Inbound Call to Lead

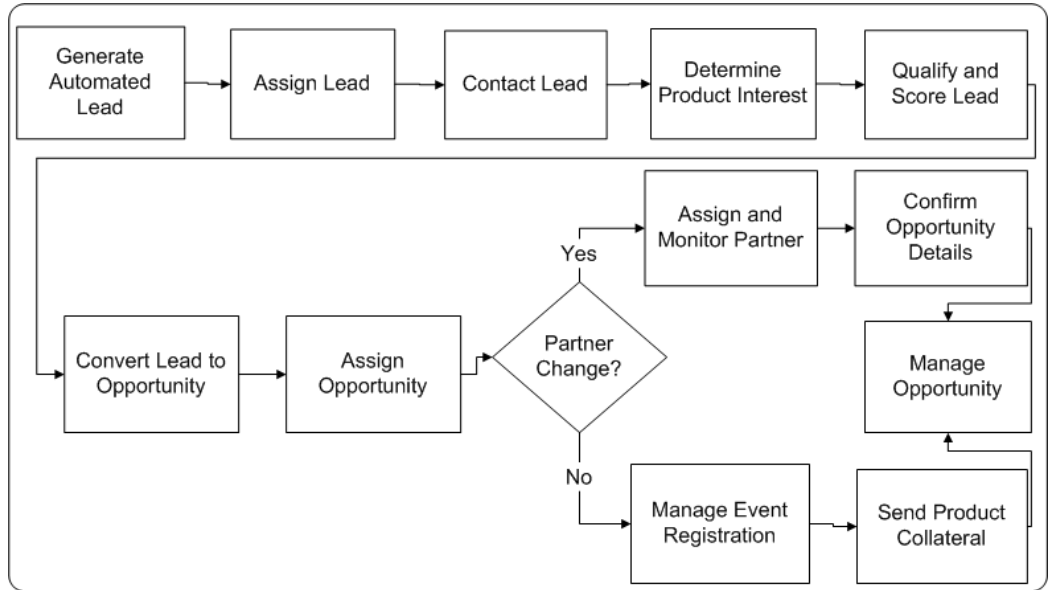
The following chart shows an inbound call being routed according to rules established in Oracle Advanced Inbound.



The Execute Campaign to TeleSales flow precedes this flow. The sales inquiry call is received by a telesales agent, and Oracle TeleSales provides information about the caller as well as the script the agent should follow. If the call is a valid lead, then the agent enters information to create a sales lead in the eBusiness Center. The agent can also register the caller for an event and send collateral to the caller. Lead to Opportunity and Opportunity to Order flows follow.

## Process Flow for Lead to Opportunity

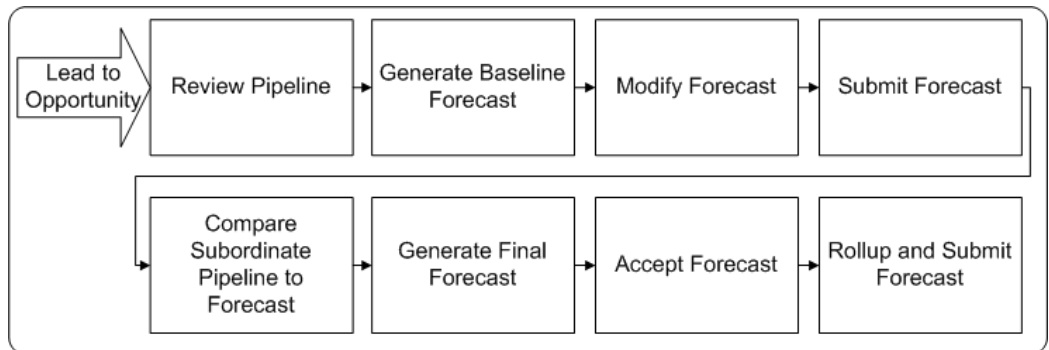
The following chart shows a sales or telesales agent changing a lead to an opportunity.



The application generates and assigns leads. The telesales agent then contacts a lead, determines the potential customer's product interest, and qualifies and scores the lead. If warranted, the agent converts the lead to an opportunity and the application assigns the opportunity. The agent can also register a person for an event and send collateral. If there is a change of partners for the opportunity, then the agent assigns and monitors the partner. The agent confirms opportunity details supplied by the partner. The opportunity is then managed until it becomes a sale or a lost opportunity.

## Process Flow for Opportunity to Forecast

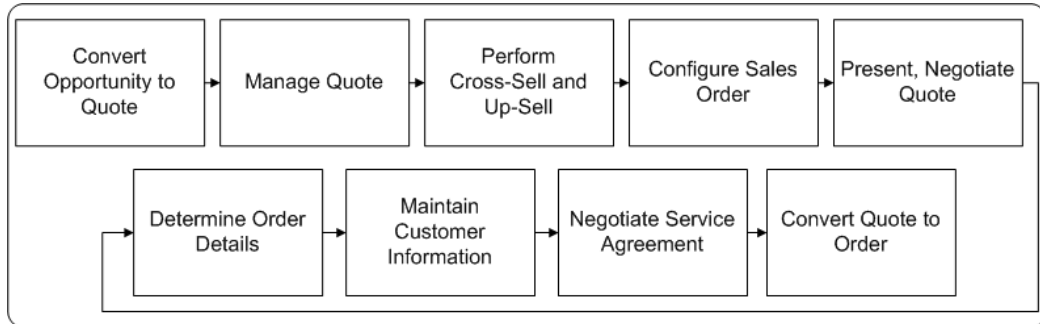
The following chart shows an opportunity assigned to a sales agent.



The Lead to Opportunity flow precedes this flow. Salespeople review their pipelines and then generate a baseline forecast. They later modify their forecasts and submit them to their managers. Managers compare their subordinates' pipeline to forecasts, then generate a final forecast and accept their subordinates' forecasts. The forecasts are rolled up the management chain and managers submit forecasts to their managers.

## Process Flow for Opportunity to Order

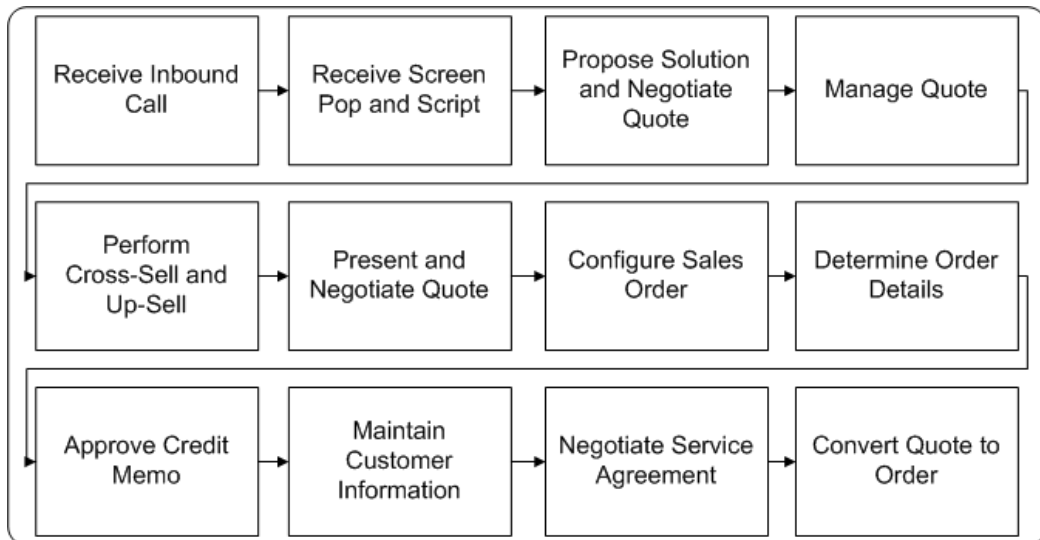
The following chart shows an opportunity becoming a quote and then an order.



Salespeople convert an opportunity to a quote and then manage the quote. They perform cross-sell and up-sell and then configure a sales order. They present the quote to the customer and negotiate to determine order details. Any update to the customer information is made in the application. Salespeople negotiate for an applicable service agreement and convert the quote to an order.

## Process Flow for Product Trade-in to Order

The following chart shows a product trade-in becoming a quote and then an order.



A customer calls in with a trade-in request or a problem. The agent receives the call and the application pops up customer information and a script. The agent proposes a solution to the customer and negotiates a quote. After performing cross-sell and up-sell, the agent presents and negotiates the quote. The customer agrees with the quote and the agent configures a sales order and determines the order details. A credit memo for

the customer is approved. The agent updates customer information, negotiates a service agreement, and converts the quote to an order.



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## Performing Searches

This chapter covers the following topics:

- Overview of Searching
- Performing Quick Searches
- Performing Expanded Searches
- Performing a Customer Smart Search
- Saving and Viewing Search Results
- Saving and Reusing a Search

### Overview of Searching

The Universal Search window provides flexible searching capability. Searches are categorized by type of information, such as leads or opportunities. Within each category you find predefined criteria in the quick searches. The expanded searches provide a wide range of parameters you can use for a more customized search. You can save the results of your search as a list or you can save your query for reuse.

You can search information displayed in dynamic tables by right clicking in the table and making a selection from a pop-up menu.

Some search results are affected by multi-operating unit access. For example, you can view lists of all quotes and orders, but can only access details about the quotes and orders that belong to operating units to which you have access. Also, for collateral, you can view lists of only the items that belong to the operating units to which you have access.

### Performing Quick Searches

Searches using the Quick Search tab of the Universal Search are optimized for retrieval of basic information. Select a search criterion for one of the available queries, fill in the criteria for all the fields, and click Search. You can perform a quick search on an

organization, party relationship, person, customer key, lead, opportunity, event, source code, collateral, and quote. The searches range from a last and first name search to a search by different product interests. Some examples of quick searches you can perform:

- Search for a person by name (first or last) or e-mail address
- Search for a source code by product category or program
- Search for collateral by name or type
- Search for a quote by operating unit

By default, the results of this search is a list of all quotes for the operating units to which you have access. This search can be refined to specific operating units by choosing an operating unit from the LOV and including it as search criteria. Purchase items for quotes are displayed by operating unit as well.

### Steps:

1. Launch the Universal Search window from the Navigator, or by clicking **Find** in the toolbar. This is the flashlight icon.
2. From the Find drop-down list, select the type of information you want to search for.
3. In the Quick Search tab, select the radio button corresponding to the query you want to use.
4. Enter search terms.

**Note:** Limit the use of the percent sign to customer-related fields. These include First Name, Last Name, and Organization Name. You can use the percent sign to represent unknown characters in a search term.

If you are searching for a party relationship, organization or person and you want to include inactive records in the search, then select the Include Inactive check box.

5. Click **Search**.

The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results by any column.

If you want to view all of the publicly accessible notes associated with an item or create new notes, then click **View Notes** in the search results.

6. Select the item in the table and open the relative window in one of the following ways:



- If you want to view this item in a separate window, select the Multiple Windows check box.
- If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
- If you want to display one item and close the search window, then click **OK**.
- If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

## Restrictions

You can search for partial words and numbers, but you must use the percent sign to indicate missing or unknown characters. For example, a search for j%n in the First name field retrieves all first names starting with the letter j and ending with the letter n, including John, Jon, and Johann.

The search combines the different search criteria using the logical AND. This means that entering two search criteria returns only results matching both search criteria. For example, searching on a partial name and a partial phone number returns only individuals whose names and phone numbers match both.

## Performing Expanded Searches

Use this procedure to search your database using the Universal Search window. If you require a search based on different sets of search criteria than those available in the Quick Search tab or you want to search by a range of values, then enter queries in the Expanded Search tab. Some examples of expanded searches that you can perform:

- Search for an event by owner or type.
- Search for a quote by contact or contact and total amount.
- Search for a quote by operating unit

By default, the results of this search is a list of all quotes for the operating units to which you have access. This search can be refined to specific operating units by choosing an operating unit from the LOV and including it as search criteria. Purchase items for quotes are displayed by operating unit as well.

### Steps:

1. Launch the Universal Search window from the Navigator, or by clicking **Find** in the toolbar. This is the flashlight icon.
2. From the Find drop-down list, select the type of information you want to search for.

3. Select the Expanded Search tab.
4. Enter search criteria in any of the fields in the Basic region or in the Advanced region, or both. For each search criteria in the Advanced region:
  1. Select the search criteria using the Item List of Values (LOV).
  2. Enter an operator using the Condition LOV.
  3. Enter the value of that condition in the Value field.
5. If you are searching for a party relationship, organization, person, code and you want to include inactive records in the search, then select the Include Inactive check box.
6. Click **Search**.

The window displays the results of your search as a dynamic table on the same tab where you entered your search criteria. You can sort the results in any column.

If you want to view all of the publicly accessible notes associated with an item or create new notes, then click the **View Notes** button in the search results.

7. Select the item in the table and open the relative window in one of the following ways:
  - If you want to view this item in a separate window, then select the Multiple Windows check box.
  - If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
  - If you want to display one item and close the search window, then click **OK**.
  - If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.

## Restrictions

The same restrictions that apply to Quick Searches are applicable for Expanded Searches.

## Performing a Customer Smart Search

Use this procedure to search for an organization, person, or contact using the Universal Search window. This search functionality is enabled by your administrator.

**Steps:**

1. Launch Universal Search from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.
2. From the Find drop-down list, select Customer Smart Search.
3. Select the Organization, Person, or Contact tab.
4. Enter the search criteria.
5. Click **Search** to run the query.
6. If you want to re-enter your search criteria, then click **Clear**.
7. From the Results window, select the item in the table and open the relative window in one of the following ways:
  - If you want to view notes associated with an item, click **View Note**.
  - If you want to see the information in the At A Glance window, then select the **At A Glance** check box.
  - If you want to view this item in a separate window, then select the check box labeled **Multiple Windows**.
  - If you want to return to the previous search window, then click **Return to Search**.
  - If you want to display an item but leave the search window open in the background so you can come back and select another item, then click **Apply**.
  - If you want to display one item and close the search window, then click **OK**.

## Saving and Viewing Search Results

You can perform a search and save the results of that search. The search results (referred to as *lists* in Oracle TeleSales) that you save are available through the Saved Results tab of the Universal Search window.

Your implementation of Oracle TeleSales might limit the size of the search results list that you can save. For example, if the limit is set to 100 lines in the list of results, then your saved list will only contain the first 100 lines of search results. See your administrator if you are experiencing a limitation on the size of list of search results you want to save.

You can also create a callback list or a list of contacts you want to export to a spreadsheet.

## Saving Search Results

### Steps:

1. Launch the Universal Search window from the Navigator, or click **Find** in the toolbar. This is the flashlight icon.
2. From the Find drop-down list, select the type of information you want to search for.
3. In the Universal Search window, perform a quick search or an expanded search.
4. Click **Save Results**.
5. Enter a list name. This is the name of your list of search results. This name must be unique for each list of results you save. Optionally, you can enter a description of the list.
6. If you want to activate a list, then select the Active box.
7. If you want to put your list in the Universal Work Queue, then select the Place on Work Queue box.
8. Click **Save**.
9. Select the Saved Results tab to view search results. You can filter the lists of results by Active, Inactive, or All. Select the list you want to view and click **Open**.

## Saving and Reusing a Search

You can save your search criteria to reuse the same search as often as you want and refresh your search results. For example, you can refresh a list of your open opportunities and hot leads on a daily basis.

### Steps:

1. Click **Find** in the toolbar. This is the flashlight icon. Alternatively, you can open Universal Search from the Navigator or from a Search button.
2. Using the Find drop-down list, select the type of information you are querying.
3. Select the Expanded Search tab.
4. Enter search criteria in any of the fields in the Basic region or in the Advanced region, or both. For each search criteria in the Advanced region:
  - Select the search criteria using the Item List of Values (LOV).

- Enter an operator using the Condition LOV.
  - Enter the value of that condition in the Value field.
5. If you are searching for a party relationship, organization, or person and you want to include inactive records in the search, then select the Include Inactive check box.
  6. Click **Save Criteria**.
  7. Enter a name for the query you are saving. For example: my hot leads. You can enter an optional description for the search.
  8. Click **Save**.
  9. Select **Open Criteria** to reuse a search. Select the search you want to reuse and click **OK**. You can modify the search criteria at this point. Click **Search** to perform your query.



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## Maintaining Customer Information

This chapter covers the following topics:

- Overview of Customer Information
- Displaying a Person, Organization, or Party Relationship in the eBusiness Center Header
- Viewing All Contacts for an Organization
- Entering a New Contact for an Existing Organization
- Entering a New Contact for a New Organization
- Entering a New Consumer
- Entering a New Organization
- Entering an Address
- Entering Person Details
- Classifying an Organization Using SIC and Other Codes
- Classifying an Organization by Purchase Interests
- Entering Revenue, Fiscal Year, and Other Organization Details
- Entering Details About an Organization's Interests
- Specifying a Sales Team
- Creating Parties During Another Activity
- Adding an Account
- Adding Sites to an Account
- Adding a Party to an Account
- Adding Account Relationships

## Overview of Customer Information

Oracle TeleSales uses Oracle's Trading Community Architecture (TCA) model which stores information about organizations, persons, and the relationships between them as separate entities. Be sure that you select the correct entity when you enter customer information.

You can only search for active customers, unless your administrator has enabled searches for inactive customers as well.

If you attempt to create a party that already exists, Oracle TeleSales will display the existing potential duplicate parties and then chose to create the new party or use an existing party.

## Customer Model

Oracle TeleSales stores customer information you enter under three separate entities. These are called parties. The entities are:

- **Person:** Use this party type to enter personal information for both consumers and contacts at organizations. Personal information includes home address, phone, as well as quotes and orders for purchases an individual makes as a consumer. If your organization sells to consumers, then this is the party type you will commonly use.
- **Organization:** Use this party type to enter information about the organization you are doing business with. Using this party type you can also view all of the quotes and orders for business purchases made by contacts at this organization.
- **Party relationship:** Use this party type to enter contacts for an organization. If your organization sells primarily to other businesses and organizations, then you will use this party type most of the time.

Each of these parties can have its own billing and shipping addresses, telephone numbers, notes, and associated tasks.

**Note:** If you are entering an address for a contact for an organization (with the party of type Party Relationship), then the address is automatically copied to the organization as well. This feature can be disabled by your administrator if needed. Only addresses are copied over, not phone numbers, e-mail addresses, or other information.

## Party Types and Customer Information

When you enter a contact for an organization using the Party Relationship party type, the application creates all three party types.

Suppose, for example, you enter Jack Jones, the purchasing manager at the ABC



Company, as a new customer at a new organization. The application automatically creates three parties:

- **Person:** Jack Jones
- **Organization:** ABC Company
- **Party Relationship:** Jack Jones purchasing manager of the ABC Company

Use the person party type to:

- Enter and view Jack Jones's home address and other contact information.
- Enter and view his personal interests.
- Enter and view all purchases he makes as a consumer. If Jack Jones buys a Christmas gift for his daughter Jane, for example, then you must record this sale using the person party type.
- Capture relationships between Jack Jones and other persons. Here is where you enter the fact that Jack Jones is the father of Jane Jones.

Use the organization party type to:

- Enter and view general information about the ABC Company, Jack Jones's employer.
- View quotes and orders for the organization. This includes those placed by Jack Jones in his capacity as employee of the organization.
- Manage leads and opportunities for the ABC Company. This includes any leads and opportunities on which Jack Jones is the contact.
- View all of the other contacts at the ABC Company.
- View all of the quotes and orders for the ABC Company.

Use the Party Relationship party type to track information relating to Jack Jones's job:

- Enter addresses, phone numbers, and other information for Jack Jones in his capacity as a purchasing manager of ABC Company.
- Capture the relationship between Jack Jones and different organizations. If Jack Jones changes jobs and moves to another organization, this is the party type you use to record his move.

## Displaying a Person, Organization, or Party Relationship in the eBusiness Center Header

Use this procedure to search for and display a person, organization, or party relationship in the eBusiness Center header.

### Steps:

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Person**, or **Organization**, or **Party Relationship**.
3. Use the various LOVs to search for the party.

If too many results display for you to examine easily, then click **Cancel** to close the LOV window and perform a search for the party using the Universal Search window instead.

## Viewing All Contacts for an Organization

Use this procedure to view all of the contacts for an organization.

### Steps:

1. If the eBusiness Center is blank or does not display the correct organization, then:
  1. From the Party Type drop-down list, select **Party Relationship**.
  2. Use the Organization List of Values (LOV) to select the organization.
  3. Use the First or Last field LOV to view the list of contacts at the organization.
2. Ensure that the Business Center header displays the correct organization and Organization is selected from the Party Type drop-down list.
  1. In the View Details region, select the name of the organization.
  2. Select the Relationship tab.
  3. The Object Relationship region displays the contacts for the organization.
  4. If you want to view or modify the details of any of the contacts, then select one by clicking on the unlabeled drill-down button to the left of the information you want to view.

5. If you want to view details about the relationship such as job title, department, and phone number, then double-click the contact type.

## Entering a New Contact for an Existing Organization

Use this procedure to enter a new contact at an existing organization.

### Steps:

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Party Relationship**.
3. Display the organization in the eBusiness Center header.
4. Click **Create**.
5. Enter the information for the individual.
6. Click **Save** on the toolbar. If the party is a potential duplicate, you can choose to use the new party or use an existing party.

## Entering a New Contact for a New Organization

Use this procedure to enter a new contact for a new organization

### Steps:

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Party Relationship**.
3. Click **Create**.
4. Click **Both**.
5. Enter the names and other information.

**Note:** The phone number and e-mail you enter here is tied to the contact and not the organization.

6. Choose a relation from the LOV.
7. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

8. Enter address information.
9. Click **OK**.

The address you enter here is the primary address for the contact and appears whenever you display the contact in the eBusiness Center header.

**Note:** By default, the address you enter here for the contact automatically becomes an address for the organization as well, unless this feature is disabled by your administrator.

10. Click **Save** on the toolbar. If the party is a potential duplicate, you can choose to use the new party or use an existing party.

## Entering a New Consumer

Use this procedure to enter a new consumer.

### Steps:

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Person**.
3. Enter the consumer's name and other information.
4. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

5. Enter address information.
6. Click **OK**.

The window closes and the address appears in the Address field in a concatenated form. The address you enter here appears whenever this consumer is displayed in the eBusiness Center header.

7. Click **Save** on the toolbar. If the party is a potential duplicate, you can choose to use the new party or use an existing party.

## Entering a New Organization

Use this procedure to create a new organization.

**Steps:**

1. Navigate to the eBusiness Center.
2. From the Party Type drop-down list, select **Organization**.
3. Use the Organization List of Values (LOV) to check if the organization already exists in the database.
4. Enter the organization name and other information.

**Note:** The phone number and e-mail you enter here is tied to the organization and does not display when you view contacts for the organization.

5. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

6. Enter address information.
7. Click **OK**.

The window closes and the address appears in the Address field in a concatenated form. The address you enter here is the primary address for the organization and appears whenever you display the organization as party type of Organization.

8. Click **Save** on the toolbar. If the party is a potential duplicate, you can choose to use the new party or use an existing party.

## Entering an Address

Use this procedure to enter an address on the Address/Phone tab of the eBusiness Center.

If you are entering a private address, then you must enter it under the party type of Person. If you are entering a business address, then enter it under the party type of Party Relationship or Organization.

A party can have multiple addresses, but only one primary address. The primary address is the one that appears in the eBusiness Center header when you display the party.

**Steps:**

1. Select the correct View Details that relates to the party's address.

For example, if you are viewing a contact in the header and you want to enter a

business address for the contact, then select the person and organization option. If the address is the personal address for the person, then select the person's name. If the address is for the organization, then select the organization name.

2. Select the Address/Phone tab.

3. Choose a country from the LOV.

4. Click the ellipsis button beside the Address field.

The Address window displays fields in the format for the selected country.

5. Enter address information.

6. Click **OK**.

The window closes and the address appears in the Address field in a concatenated form.

7. If the address is the primary address for the party, then select the Primary check box.

**Note:** You can only have one primary address for a contact, consumer, or organization.

8. Specify the different uses using the Address Usage column. A single address can have multiple uses, such as the shipping and billing address, for example.

1. Use the Address Usage field LOV to specify a use for this address.

2. To specify additional uses, select a new line and repeat the previous step.

9. If the address is the primary address for that Address Type, then select the Primary check box next to the address type.

You must select this check box only if you have specified more than one address for a specific type. For example, if you specified ten addresses to be the billing addresses for an organization, then you must select one of these as the primary billing address. Designating an address to be primary means that this address is automatically defaulted whenever you enter an address for that type. For example, the billing address designated as primary is the one that will show up by default on a customer invoice.

**Note:** A primary designation for an address type is not the same as the primary address for a party.

10. In the Contact Points window, use the Contact Method LOV to select the

information type to enter (telephone number, e-mail address, or URL) and enter that information.

11. Enter any contact restrictions.
12. Click **Save** on the toolbar.

## Restrictions

By default, an address you enter for a contact at an organization (party of type Party Relationship) automatically becomes an address for the organization as well. However, a contact's primary address does not automatically become the primary address for the organization as well.

If no style is assigned to a selected country, then all the address fields display.

To delete the use of an address or an address type, select Inactive. You cannot delete an address because other types of information, including leads and opportunities, might depend on it. But you can either edit the address or effectively remove it from use. Making an address inactive means that it is no longer visible to other users, unless these users specify that they want to view inactive addresses.

The current version of Oracle TeleSales automatically enters today's date as the end date after you select the Inactive check box and vice versa. However, entering a future date as the end date does not automatically make the information inactive after that date.

## Entering Person Details

Use this procedure to enter details about a person. Details include name pronunciation, educational background, product interests, personal interests, employment history, and military history.

## Prerequisites

- Display the consumer or the organizational contact in the eBusiness Center header.

### Steps:

1. In the View Details region, select the individual's name.

**Note:** This option is unavailable if the header displays information for an organization (the party type of Organization).

2. Select the Person tab.

3. Enter information about the person using the various buttons.
4. To enter language information, click **Person Language**. Enter the language information and click **OK**.
5. Click **Details** to add information on product interest, job or military history, education, party interest, sales team, party classification.
6. When you are done, select another tab or click **Cancel** to close the Person Details window. Click **Yes** to save your changes.
7. Click **Restrictions** to add any restrictions that apply to contacting the customer.
8. Click **OK** to close the Restrictions window, then click Save in the toolbar.

## Restrictions

When you save, the list is not refreshed automatically, so your entry does not display in the list until the next time you select the tab or open the window.

## Classifying an Organization Using SIC and Other Codes

Use this procedure to classify an organization according to your organization's classification scheme. You can apply multiple classifications to one organization. For example, you can apply multiple codes from the seeded U.S. government's Standard Industrial Classification (SIC) to capture the whole range of areas where the organization does business.

## Prerequisites

- Display the organization in the eBusiness Center header.

### Steps:

1. In the View Details region, select the organization name.
2. Select the Organization tab.
3. Click **Details**.  
The Organization Details window appears.
4. Select the Party Classification tab.
5. For each classification:



1. Click **New**.
  2. Use the Class Category List of Values (LOV) to enter a classification category. This entry changes the available classifications in the next step.
  3. Use the Class Code LOV to enter a classification.
  4. Enter a date in Start Date Active.
  5. Optionally, enter an end date.
  6. Optionally, enter a rank. This field is a free-text field.
  7. If this classification is the primary classification for this organization, then select the Primary flag. You can only select one classification as the primary classification.
6. Click **Save** on the toolbar.

## Classifying an Organization by Purchase Interests

Use this procedure to classify an organization according to purchase interest categories. Purchase interest categories are broken up into interest types, primary interests, and secondary interests.

### Prerequisites

- You must display either the organization or a contact at the organization in the eBusiness Center header.

### Steps:

1. In the View Details region of the eBusiness Center, select the name of the organization.

**Note:** This option is unavailable if the header displays information on a consumer (the party type of Person).

2. Select the Organization tab.
3. Click **Details**.  
The Organization Details window appears.
4. Select the Site Classification tab.

5. Use the interest Type, Primary interest, and Secondary interest Lists of Values (LOV) to classify the organization's interest in your products.
6. Optionally, use the Location LOV to enter an address for the site with those purchase interests.
7. Click **Save** on the toolbar.
8. Click **New** to enter additional site classifications.

## Entering Revenue, Fiscal Year, and Other Organization Details

Use this procedure to enter information about an organization. This includes purchase interests and information on the fiscal year and revenue.

### Prerequisites

- You must display either the organization or a contact at the organization in the eBusiness Center header.

### Steps:

1. In the View Details region, select the name of the organization.  
**Note:** This option is unavailable if the header displays information on a consumer (the party type of person).
2. Select the Organization tab.
3. Enter information about the company. See the following table for information on specific fields.
4. Click **Save** on the toolbar.

## Entering Details About an Organization's Interests

Use this procedure to enter details about an organization's interests. The information you enter here is stored with the party of type Organization.

### Prerequisites

- Display the organization in the eBusiness Center header.

**Steps:**

1. In the View Details region, select the organization name.
2. Select Organization tab.
3. Click **Details**.  
The Organization Details window appears.
4. Select the Party Interest tab.
5. You can enter multiple interests. For each entry:
  1. Enter the interests using the fields provided.
  2. Click **Save** on the toolbar.
  3. Click **New** to enter additional records.
6. When you are done, select another tab or click **Cancel** to close the Organization Details window.

## Specifying a Sales Team

**Prerequisites**

- You must display the consumer, contact, or an organization in the eBusiness Center header.

**Steps:**

1. In the View Details region of the eBusiness Center, select the appropriate option.
2. Select the Person tab or the Organization tab.
3. Click **Details**.  
The Person Details or Organization Details window appears.
4. Select the Sales Team tab.
5. You can add multiple sales team members and partners to the sales team or a whole sales team:
  1. If you want to select a partner for the sales team, then, from the Display drop-down list, select Partner. The selection is Employee by default. The search results enable

you to view partner information including address, partner type, level, and certification level. Select a partner and click **OK**.

2. Place your cursor in the Name field.
3. Click **New**.
4. Use the Name List of Values (LOV) to select a sales team member.
5. If you want this individual to have view-only access to all opportunities and leads for this customer regardless of whether they are on the opportunity or lead sales team, then use the Role LOVs to select Account Manager.

**Note:** The role you assign here is different from the group and role you select for reporting purposes.

6. If you want to keep the new team member on the team regardless of the assignment made by the territory management module, then select the **Keep** check box.
7. Click **Save** on the toolbar.

## Creating Parties During Another Activity

Use this procedure to create new consumers, organizations, or organizational contacts. This procedure provides an alternate way of creating parties in your database and can be used only in the Collateral, Events, Lead, or Opportunity tabs in the eBusiness Center. Use this method to enter basic customer information for sending collateral, enrolling customers in events, and creating leads and opportunities.

### Navigation

Navigator > eBusiness Center > Collateral

Navigator > eBusiness Center > Event

Navigator > eBusiness Center > Lead

Navigator > eBusiness Center > Opportunity

## Prerequisites

- You can only access this method of creating new customers while you have the Collateral, Event, Lead, or Opportunity tab selected in the eBusiness Center.

### Steps:

1. From the Navigate To menu choose **Create Party/Contact**.

The Creation of Party window appears.

2. From the Party Type drop-down list, select the party type you are creating:
  - **Organization:** to create an organization
  - **Person:** to create a consumer.
  - **Party Relationship:** to create a contact at an organization.
3. If you are creating a contact at an organization, then the Organization field populates automatically with the name of the organization displayed in the header.
4. Enter the individual's name.
5. If you are creating a contact at an organization, then use the Relation List of Values (LOV) to enter a relationship. Usually this is "Contact".
6. Enter the person's e-mail address. You need this to send confirmation e-mail and electronic collateral.
7. Enter other contact information.
8. Click **OK**.

## Adding an Account

Use this procedure to add a new account from the eBusiness Center.

### Prerequisites

- You must display the party in the eBusiness Center header.

#### Steps:

1. In the View Details region, you must select a person name, organization name, or account number.
2. Select the Account tab.

The Account tab displays a list of existing accounts for the selected party.
3. Click New.

The displayed account detail information is cleared and ready for data entry.
4. Enter a name for the account.

5. Select an account status, such as active.
6. Click **Save** on the toolbar.
7. If you want to add additional account information, then click **Details**.  
The Account Details window displays.
8. If you want to add roles to the account, then click the Roles tab and perform the following steps:
  1. Select the party.
  2. Select the role type.
  3. Select the status for the role, such as active.
  4. Select the appropriate address for the party from the LOV. After, saved, the address cannot be updated.
  5. Optionally add the same party and role again with another address and repeat for any number of addresses.
  6. Optionally add other parties and roles.
9. If you want to relate the new account to another account, then click the Relationships tab and select the account.
10. Click Save in the toolbar.

## Adding Sites to an Account

Use this procedure to add sites to an account.

Note that an internal mark (depending on system settings) can be added to your newly created account sites. If you attempt to create a new account site and the internal mark has not been added, you will receive this error message:

*You will not be able to create the Account Site since your default operating unit has not been set or has been set to a value that is not valid. Please contact your System Administrator.*

You will be able to see the internal mark only on the account details form and only if you have access to it through your responsibility.

### Prerequisites

- You must display the party in the eBusiness Center header.

- Addresses must be added for the party in the eBusiness Center.

**Steps:**

1. In the View Details region, you must select a person name, organization name, or account number.
2. Select the Accounttab.
3. Select the account in the table.
4. Click **Details**.
5. Select the Sites tab.
6. Click **New**.
7. Use the LOV to select one of the party sites.
8. Use the LOV to select the correct site use.
9. Select **Active** if the site is active for the account.
10. Select **Primary** if this is the primary site for the account.
11. Click Save on the toolbar.

## Adding a Party to an Account

You can assign a role to a party for an account. You can assign multiple addresses to a role.

### Prerequisites

- The party must first have a relationship to the account owner.
- The account owner information is open in the eBusiness header.
- The address must be added as a site for the account.

**Steps:**

1. In the eBusiness Center, select the Accounttab.  
The tab displays the accounts in a dynamic table.
2. Select the account in the table.

3. Click **Details**.
4. Select the Roles tab.  
A list of currently assigned roles appears.
5. Click **New**.
6. Select a party name from the LOV.
7. Select the role type the party plays for the account.
8. For Role Status, select active, inactive, or deleted.
9. If this is the primary role for the account, then select **Primary Role**.
10. Select the appropriate address for the party.
11. Click Save on the toolbar.

## Restrictions

A party can be given more than one role. A party with any given role can have more than one address. Add the party again, assign it the same role, and select another address.

## Adding Account Relationships

Use this procedure to add relationships between the displayed account and other accounts.

Note that an internal mark (depending on system settings) can be added to your newly created account relationships. If you attempt to create a new account relationship and the internal mark has not been added, you will receive this error message:

*You will not be able to create the Account Relationship since your default operating unit has not been set or has been set to a value that is not valid. Please contact your System Administrator.*

You will be able to see the internal mark only on the account details form and only if you have access to it through your responsibility.

## Prerequisites

- You must display the party in the eBusiness Center header.

### Steps:

1. In the View Details region, you must select a person name, organization name, or



account number.

2. Select the Account tab.
3. Select the account in the table.
4. Click **Details**.
5. Select the Relationships tab.
6. Click **New**.
7. Use either the Related Account Name or Related Account Number LOV to find the account.
8. In Relationship Type, choose whether the account is in a parent/subsidiary relationship, a reciprocal relationship, or all.
9. Select the status for the account relationship, such as Active.
10. Select **Reciprocal** if you want to save the relationship for the related account as well as for the current account.

**Example**

Add a relationship for account A with account B and select reciprocal. Account B now has a relationship with account A

Add a relationship for account X with account Y and do not select reciprocal. Account Y does not have a relationship with account X.

11. Click Save on the toolbar.



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## Recording Customer Relationships

This chapter covers the following topics:

- Overview of Relationships
- Capturing a Relationship Between Two Organizations
- Capturing a Relationship Between Two Persons
- Capturing a Relationship Between a Person and an Organization
- Ending a Relationship Between a Person and an Organization

### Overview of Relationships

You can use the Relationship tab of the eBusiness Center to capture both business and personal relationships between any parties in the database and between outside parties and your internal organizations.

### Types of Relationships You Can Capture

You can capture:

- Business relationships between two individuals, such as "is the manager of." You can establish these types of relationships for business contacts (parties of type Party Relationship).
- Personal relationships between two individuals, such as "is the father of," and "is the son of." You can establish these relationships for consumers and business contacts (parties of type Person and Party Relationship).
- Relationships between individuals and organizations, such as "is an employee of," or "purchasing manager for." You can establish these relationships for business contacts (party of type Party Relationship).
- Relationships between different organizations, such as "is a subsidiary of." You can

establish these relationships for organizations (party of type Organization).

- Relationships between outside organizations and your own internal organizations. For example, you can track the actions of your competitors by setting up the relationship "is the competitor of" between outside organizations and your own internal organizations.

There is no limit to the number of relationships or the combination of relationships you can capture for any one person or organization.

You can make a relationship inactive, for example, when the contact is on an extended vacation. Or you can terminate a relationship by entering an end date, for example, when an individual moves to another company.

## How You Capture a Relationship

You capture a relationship between two parties by displaying one of the parties in the eBusiness Center and entering the relationship to another party on the Relationship tab.

If you want to capture relationships your organization has with other organizations such as competitors or suppliers, then you must enter your organization into the database as you would a customer. The only difference is that you flag your organization as internal by selecting the Internal check box on the Organization tab.

## Reciprocal Relationships are Captured Automatically

Most relationships, such as "is the father of" or "is a subsidiary of" describe the relationship in only one direction. To capture a relationship between two entities fully, you must also specify the reciprocal relationship.

For example, if you specify that John is the father of Mary, then you want Mary's information to include the fact that she is the daughter of John. If you specify that ABC Company is the subsidiary of XYZ Corporation, then you want the XYZ Corporation information to show that it is the parent company of ABC Company.

Oracle TeleSales supplies the reciprocal relationships for you automatically. You must enter only one of the relationships.

## Capturing a Relationship Between Two Organizations

Use this procedure to establish and create a relationship between two organizations. For example, to capture the fact that one company has been acquired by another.

### Prerequisites

- You must display one of the organizations or display a contact at one of the organizations in the eBusiness Center header.

- You must have update access to both organizations.

**Steps:**

1. In the View Details region, select the name of one of the two organizations.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship of the organization to the second organization.
4. From the Object Type drop-down list, select Organization.
5. Choose the second organization from the Object Name List of Values.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

## Capturing a Relationship Between Two Persons

Use this procedure to capture a relationship between two persons, such as a reporting relationship.

### Prerequisites

- You must display one of the consumers or display one of the two organizational contacts in the eBusiness Center header.
- You must have one of the following:
  - Update access to both persons

**Steps:**

1. In the View Details region, select the name of the person.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship that person has to the second person. For example, "Is the manager of," "Is the spouse of," or "is the father of."
4. From the Object Type drop-down list, select **Person**.

5. Use the Object Name List of Values to enter the second person. The LOV displays all parties available to create a relationship with.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

## Capturing a Relationship Between a Person and an Organization

Use this procedure to capture the relationship between a contact and an organization, for example, when a contact moves from one organization to another. A contact can have relationships with many organizations.

### Prerequisites

- You must display a consumer or display a contact at an organization in the eBusiness Center header.
- You must have update access to the organization.

### Steps:

1. In the View Details region, select the person's name.
2. Select the Relationship tab.
3. From the Type drop-down list, select the relationship of the person to the organization.
4. From the Object Type drop-down list, select **Organization**.
5. Use the Object Name List of Values to enter the organization.
6. Enter a start date if different from the date of entry.
7. If there is a time limit to the relationship, then enter an end date.
8. Click **Save** on the toolbar.

## Ending a Relationship Between a Person and an Organization

Use this procedure to indicate a person is no longer associated with an organization, for example, when the person moves to a job at another organization.

## Prerequisites

- You must display the contact in the eBusiness Center header.

### Steps:

1. In the View Details region, select the name of the organization.
2. Select the Relationship tab.
3. Select the relationship you want to terminate.
4. Select the Inactive check box.
5. If you know the relationship has ended permanently, then enter a date in the End Date field.
6. Click **Save** on the toolbar.





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## Working with Leads

This chapter covers the following topics:

- Overview of Working with Leads
- Creating a Lead in the eBusiness Center
- Displaying a Lead in the eBusiness Center
- Displaying a Lead in the Lead Center
- Creating a Lead in the Lead Center
- Entering Interests, Contacts, and Preferred Partner in the Lead Center
- Accepting a Lead Assigned to You
- Refusing a Lead Assigned to You
- Assigning a Lead to Someone Else
- Selecting Individuals and Sales Groups for a Lead Sales Team
- Viewing Opportunities Created from a Lead
- Qualifying a Lead
- Working With Leads in the Universal Work Queue

### Overview of Working with Leads

Leads are designed to capture the initial contacts with potential customers, gathering just enough information to tell a sales organization if a lead merits more sales resources, should be set aside for a later date, or should be abandoned entirely.

You can use leads to gather information on products that interest a customer, budgets for the lead, contact names, time frame for the sale, tasks and notes.

The person creating a lead can assign it manually to a sales agent who becomes the lead owner, and can specify other agents to be on the sales team for the lead. Or the agent can let the Oracle Territory Manager module automatically assign an owner and a sales

team to the lead.

## Lead Routing

Depending on the implementation, Oracle TeleSales can automatically assign leads to individual agents who become the lead owners and to whole sales teams. When individual agents create leads, they automatically become the lead owners and can assign the leads manually. Depending on the implementation, the assigned lead shows up on the work queue of the owner of the lead or the entire sales team. The agent can accept or refuse the lead assignment by displaying the lead in the Lead Center and clicking Accept or Decline.

## Lead Status and Qualification

The progress of a lead is tracked by its qualification flag and status.

The status of a lead and lead qualification provide methods of tracking lead progress. A lead must become qualified before it can be turned into an opportunity.

The agent must evaluate the likelihood of a particular lead turning into a sale and assign it a rank.

## Lead Rank

Lead rank tracks the desirability of the lead. Agents can select a value manually from the Lead Rank drop-down list or they can let the application assign the rank automatically by clicking the Rank button.

The application determines the quality of the lead by using the rules engines set up by the administrator.

## Assigning Leads To Sales Representatives

Lead creators can either enable the territory assignment program to assign the leads to sales representatives automatically or choose the sales representatives manually. The sales representatives then turn the leads into new opportunities or link them to existing opportunities.

## Creating a Lead in the eBusiness Center

Use this procedure to create a lead for an organization or a consumer.

### Prerequisites

- Display the party in the eBusiness Center header.

### Steps:

1. In the View Details region, select the person, organization, or contact for the lead.  
**Note:** When you create a lead for an organizational contact the lead is recorded for the organization and the contact is listed as the primary contact for the lead.
2. Select the Lead tab.
3. Click **New**.
4. Enter a name for the lead in the Lead Name text field. The name you enter later used as the name for any opportunity you create from this lead.
5. Enter a name for the project. This is the name used for the project in the opportunity you create from this lead.
6. Optionally, use the Primary Contact LOV to enter the individual who is the primary contact for this lead. For consumers, this field defaults to the name of the consumer.
7. If an organization has many locations, then enter a location for the lead.
8. If you entered a primary contact, then select a role for the contact using the Contact Role LOV.
9. If you entered the source code for the customer in the Overview tab, then the Source Code is populated. If you did not make the entry, then enter it now using the List of Values (LOV). If you do not know the source code name, then save your work and search for the source code using Universal Search.
10. Specify the sales channel, an approximate budget, currency code, and budget status.
11. Use the Time Frame LOV to enter a time frame in which you expect the lead to close.
12. Use the Lead Rank field to evaluate the desirability of the lead. If you leave the Lead Rank field blank, then the application ranks the lead based on the information you have entered. The ranking takes place after you save the lead.
13. If you want to leave the territory management program to automatically assign the lead to a member of the sales team, then leave the Lead Owner field blank. Make an entry only if you want to override the territory assignment program and assign this lead to an agent manually.
14. If the lead is qualified, then select the Qualified check box.

If you do not select the Qualified check box, the application checks to see if the lead is qualified using the Qualification Engine.

15. Optionally, enter lead purchase interests, including the quantity the customer wants to purchase and the purchase amount.
16. Click **Save** on the toolbar.
17. If you want to add other lead information, click **Details** to launch the Lead Center.

## Restrictions

The status of the lead is New by default. You can choose to override the default designation by selecting a status of your own.

You cannot create a lead for an account.

A close reason is required only if you change the status of a lead to a status with a Closed flag.

**Note:** In some implementations, it might be possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This can result in you losing access to that information. Make sure you select the Keep check box next to your name on the Sales Team tab in the Lead Center to override territory assignment and prevent this from happening.

## Displaying a Lead in the eBusiness Center

Use this procedure to display a lead for an organization or a consumer in the eBusiness Center.

In this procedure you find your lead in a list of leads displayed in the Leads tab of the eBusiness Center. If you have a large number of leads to sort through or must search on leads using specific criteria, then search for a lead using the Universal Search Window.

## Prerequisites

- Display the party in the eBusiness Center header.

### Steps:

1. If you want to view leads for a consumer, then, in the View Details region, select the person's name.

2. If you want to view leads for an organization, then select the name of the organization.
3. If you want to view leads for an organization where the displayed contact is a contact for the leads, then select the name of the organization and the contact name.
4. Select the Lead tab.
5. If you want to view only open leads, then make sure the Display All check box is not selected.
6. If you want to view only leads where you are the owner, then select the Owner check box.
7. You can sort the leads in the table by any of the available fields by clicking on the field header.
8. Select the lead you want to view or modify from the list. The basic information about the lead appears on the right side of the tab.
9. If you want to view more details about the lead, then click **Details** to launch the Lead Center. If you want to open the details in a new window rather than using an existing Lead Center window, then select the **Multiple Details** check box before clicking **Details**.

## Displaying a Lead in the Lead Center

You can display a lead in the Lead Center in a number of ways. These include:

- Search for the lead using the Universal Search window, page 3-1
- Display the lead in the eBusiness Center first and then click **Details** to open the Lead Center.
- Double-click a lead listed in the Universal Work Queue, page 6-11
- Navigate to the lead from the opportunity summary in the Dashboard tab of the eBusiness Center.

## Creating a Lead in the Lead Center

Use this procedure to create a lead for an organization or a consumer in the Lead Center.

**Steps:**

1. Navigate to the Lead Center
2. From the Party Type drop-down list choose either **Organization** or **Person** (consumer).
3. Use the Customer field List of Values to enter the organization or consumer name.
4. Optionally, use the Primary Contact List of Values (LOV) to enter the individual who is the primary contact for this lead. For consumers, this field defaults to the name of the consumer.
5. Optionally, enter a unique name in the Lead Name text field. The name you enter later used as the opportunity name for any opportunity you create from this lead.
6. Enter a name for the project. The name you enter later used as the project name for any opportunity you create from this lead.
7. Optionally, enter the address, status, source code, campaign offer, response channel, and sales channel.
8. Optionally, enter a currency amount in the Budget field and select a budget status using the Budget Status LOV.
9. Optionally, use the Time Frame LOV to select a time frame for closing the deal.
10. Use the Lead Rank field to evaluate the desirability of the lead. If you leave the Lead Rank field blank, then the application ranks the lead based on the information you have entered. The ranking takes place after you save the lead.
11. A lead can become qualified automatically using the Qualification Engine. If you want to qualify a lead manually, then select the **Qualified** box.
12. A close reason is required only if you change the status of a lead to closed.
13. If you want to assign this lead to someone in your sales team, then use the Lead Owner LOV to enter the name of the individual. The person becomes the owner of the lead and receives notification in the work queue of this assignment.
14. Click **Save** on the toolbar.

## Entering Interests, Contacts, and Preferred Partner in the Lead Center

Use this procedure to enter a prospect's purchase interests and other details into an existing lead using the Lead Center.

## Prerequisites

- You must create a lead and display it in the Lead Center.

### Steps:

1. Navigate to the Lead Center.
2. On the Purchase Interest tab, use the Lists of Values (LOVs) to enter the customer's product interest. You can select the product description from among the multiple operating units you can access.
3. In the Contact tab, enter the contacts for the lead using the First Name LOV. The contacts must already exist in the database before you can add them here.

**Note:** If you are creating the lead for a contact at an organization, then that contact is automatically made the primary contact for the lead.

4. You can designate one contact as the primary contact by selecting the Primary check box.
5. On the Partner tab, use the Preferred Partner LOV to search for a partner. The search results enable you to view partner information including address, partner type, level, and certification level. Select a partner and click **OK**.
6. Save your changes.
7. Depending on your implementation, the lead engine will run automatically. If you want to see how the changes affect the lead quality, channel, or resource you can manually run the engine by choosing **Run Lead Engine** from the Actions menu.

## Accepting a Lead Assigned to You

Use this procedure to accept a lead assigned to you. When a lead is assigned to you, it automatically appears in your Universal Work Queue.

### Steps:

1. Display the lead in the Lead Center. You can do so by double clicking the lead name in the Universal Work Queue. For more details, see *Accessing Leads Opportunities, and Other Work from Your Work Queue*, page 1-5.
2. Select the Accepted check box.

3. Click **Save** on the toolbar.

## Refusing a Lead Assigned to You

Use this procedure to refuse a lead that has been assigned to you in error.

If the owner of a lead declines the lead, then the owner is removed from the sales team unless Keep is selected for the owner in the Sales Team tab.

### Steps:

1. Display the lead in the Lead Center by double clicking the lead name in the Universal Work Queue. For more details, see *Accessing Leads, Opportunities, and Other Work from Your Work Queue*, page 1-5.
2. Click **Decline**.
3. Use the Decline Reason List of Values to select the reason.
4. Click **OK**.

## Assigning a Lead to Someone Else

Use this procedure to assign a lead to someone else.

### Prerequisites

- Display the lead in the Lead Center

### Steps:

1. If you want to leave the territory management program to automatically assign the lead to a member of the sales team, then delete any name from the Lead Owner field.
2. If you want to assign this lead to an agent manually, then use the Lead Owner field List of Values to enter an agent's name.
3. Click **Save**.

## Selecting Individuals and Sales Groups for a Lead Sales Team

Use this procedure to manually add sales agents and partners to a lead sales team. You can add individuals or entire sales groups to your team with this procedure.



Adding someone to the sales team makes them able to view the lead and add notes and tasks. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the lead.

If your organization has implemented Oracle Territory Manager, then a sales team is assigned to the lead automatically. However you can use this procedure to override any automatic assignment by selecting the Keep check box.

### Navigation

Navigator > Lead Center

Navigator > Universal Work Queue > Get Work for lead

## Prerequisites

- Display the lead in the Lead Center

### Steps:

1. Select the Sales Team tab.

The tab lists the current sales team.

If your organization has set up the Oracle Territory Manager module, then the sales team is automatically assigned to the lead when you create it.

2. If you want to add the team members of an entire sales group, then:

1. Click **Add Resource Team**.

The Add Resource Team window appears.

2. Search for the sales team you want to add by entering its name or partial name in the Team Name and clicking **Find**. Use the % sign to substitute for any missing characters.

The sales teams that match your search criteria display in the Team Name column.

3. Select the sales team by positioning the cursor in the sales team information.

4. The names of the individuals on the sales team display.

5. If you want to provide the new team members with rights to modify lead information, then select the Provide Full Access check box.

6. Click **OK**.

The sales group sales team is added to the lead sales team. Each individual has the Keep check box selected. This means that their assignment cannot be

overridden by the Territory Manager module.

3. If you want to add an individual sales team member, then on the Sales Team tab:
  1. Use the Name List of Values to add the agent.
  2. If you want this individual to have update privileges for this lead, then select the Full check box. All team members have view privileges.
  3. If you want to keep this individual regardless of the assignment made by the Oracle Territory Manager module, then make sure the Keep check box is selected.
  4. Click **Save** on the toolbar when you have completed adding agents.

**Note:** In some implementations, it is possible for you to lose access to customer, lead, and opportunity records you create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. To prevent reassignment, select the Keep check box next to your name on the Sales Team tab.

## Viewing Opportunities Created from a Lead

Use this procedure to view in the Lead Center opportunities that have been created from a lead.

### Prerequisites

- Display the lead in the Lead Center.

### Steps:

1. Select the Opportunity tab.

Any opportunities created from the lead are listed.
2. If you want to view an opportunity, then select the opportunity from the list and click **Opportunity Center**.

The Opportunity Center displays the details of the opportunity.

## Qualifying a Lead

Use this procedure to qualify a lead. A lead must be qualified before it can be turned into an opportunity.

### Prerequisites

- Display the lead you want to qualify in the Lead tab of the eBusiness Center or in the Lead Center.

#### Steps:

1. A lead can become qualified automatically using the Qualification Engine.
2. If you want to qualify a lead manually, then select the Qualified box.
3. Click **Save** on the toolbar.

## Working With Leads in the Universal Work Queue

The Universal Work Queue displays a list of leads for quick navigation and update. There are two Universal Work Queue windows available, one with the queue listed on one side of the window, and the other with the choices in a cascading menu.

#### Steps:

1. In the Select Items list or the Universal Work Queue nodes, highlight either My Leads (Owner) or My Leads (Sales Team). Optionally, you can select your choice and skip steps 2 and 3.

The next selection list appears.

2. Select one of the following options:
  - 30 Days: Open leads created in the last 30 days
  - 90 Days
  - 6 Months
  - 1 Year
  - All: All open leads

The next selection list appears.

3. Optionally, select a lead status.

The window displays a list of leads that match the selected criteria and displays related note history for any selected lead.

4. If you want to update a lead, then perform the following steps:
  1. Select the lead and select your choice from the Action drop down list. If you select more than one lead, then some actions are not available.
  2. Enter or select your changes.
  3. Optionally, enter a note.
  4. Click **Apply**.  
Your changes are saved for one or more selected leads.
5. Optionally, double-click anywhere in a row to open the lead in the Lead Center.

## Restrictions

The Update Lead region can be customized by your administrator, including adding actions to the Action drop down list.

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## Tracking Opportunities

This chapter covers the following topics:

- Overview of Tracking Opportunities
- Displaying an Opportunity in the eBusiness Center
- Creating an Opportunity from a Lead
- Creating an Opportunity Without a Lead in the eBusiness Center
- Linking an Opportunity to Leads
- Displaying an Opportunity in the Opportunity Center
- Creating an Opportunity in the Opportunity Center
- Entering Purchase Interests
- Entering Opportunity Contacts
- Changing the Owner of an Opportunity
- Changing a Customer for an Opportunity
- Classifying an Opportunity
- Tracking Obstacles to an Opportunity
- Tracking Competition for an Opportunity
- Selecting Individuals and Sales Groups for the Opportunity Sales Team
- Viewing Partner Selection Criteria and Routing History for an Opportunity
- Routing an Opportunity to a Partner
- Viewing Leads Associated with an Opportunity
- Freezing an Opportunity
- Splitting Up an Opportunity If Only Some Items Can Close
- Deleting Purchase Items from an Opportunity
- Copying an Opportunity

- Updating Opportunities
- Performing a Mass Update of Opportunities
- Updating Your Pipeline
- Working With Opportunities in the Universal Work Queue
- Splitting Up a Purchase Line for Inclusion in Multiple Forecasts
- Managing Opportunity Forecast Amounts
- Using Personal Opportunities Lists
- Entering Sales Credit for Purchases in an Opportunity
- Viewing Sales Credit Totals for an Opportunity
- Closing an Opportunity So You Can Receive Sales Credit
- Viewing the History of an Opportunity

## Overview of Tracking Opportunities

Use an opportunity to enter and track:

- **Purchase Interests:** Enter the products or categories of products the customer is interested in buying and the projected amounts.
- **Sales Team:** Add individual sales team members or entire sales groups to form a team or let the territory management module assign a team.
- **Sales Methodology:** Select a sales methodology. A sales methodology has sales stages, each stage containing defined tasks. The System administrator sets up the sales methodology.
- **Sales Credit:** The sales credit the sales team members are to receive.
- **Contacts:** Contacts for the opportunity.
- **Obstacles:** Enter information about your competitors.
- **Closing Information:** Track orders placed for won opportunities as well as information about competitors for lost opportunities. If an opportunity results in a sale, you must remember to enter closing information for an opportunity so the sales team can receive sales credit for their work. This is available from the menu.
- **Classification:** Classify an opportunity according to categories defined by your implementation team. The values you enter here can be used to assign this opportunity to the appropriate sales team.
- **Tasks:** View and assign tasks relating to the opportunity. The tasks display in the

work queue of the individual you assign them to.

- **Leads:** View the leads linked to the opportunity.
- **Quotes and Orders:** View the quotes and orders resulting from the opportunity or launch the Quoting window to create new quotes and orders.
- **Forecasts:** The sales credits for each purchase interest are added up as your sales forecast.
- **Partners:** Enter criteria the channel manager in Oracle Partners Online will use to select a partner, or, when authorized, route the opportunity to a partner yourself.

## How You Create an Opportunity

There are two ways you can create an opportunity. You can:

- Create an opportunity from a qualified lead, page 7-3
- Create an opportunity without a lead, page 7-4

## Creating an Opportunity from a Qualified Lead

When a sales representative attempts to create an opportunity from a lead, Oracle TeleSales automatically performs a check for potential duplicate opportunities.

If the application finds a potential duplicate, the sales representative can:

- Link the lead to the existing opportunity.

**Note:** Agents can link a lead to existing opportunities even if they do not have access to those opportunities.

Purchase and other information is not transferred to the matching opportunity, but agents can access the lead from the Lead tab of the linked opportunity.

- Copy purchase line items to the duplicate opportunity.

The copied items are transferred to the potential purchases in the existing opportunity. The copy process removes them from the lead.

The sales representative creating the new opportunity becomes the leader of the opportunity team. Any team member required to make modifications to opportunity information must be designated as having *Full Access*. This is done by selecting the Full check box.

The application automatically notifies new team members of the assignment through their work queues.

The team members use the opportunity to record information on the negotiations, to prepare forecasts, and to assign sales credit.

A team leader can decide to create a quote for a customer at any time. Quotes can be configured for all of the purchase items.

## Creating a New Opportunity Directly

You can create new opportunities without a prior lead in the eBusiness Center or the Opportunity Center. The Opportunity tab of the eBusiness Center enables you to enter basic opportunity information. Later, you can use the Opportunity Center to add opportunity details.

## Displaying an Opportunity in the eBusiness Center

Use this procedure to display opportunities for a consumer or an organization.

### Prerequisites

- Display the party in the eBusiness Center header.

#### Steps:

1. Select the Opportunity tab. You can sort the opportunities by clicking on the table column headings.
2. If you want the list to display only opportunities you receive sales credit for, then select the Sales Credits check box.
3. If you want to view only open opportunities, then deselect the Display All check box.
4. Select the opportunity you want to view or modify from the list on the left. The basic information about the opportunity appears on the right side of the tab.
5. If you want to view notes for this opportunity, then click **Opportunity Notes**.
6. If you want to view more details about the opportunity, then click **Details** to launch the Opportunity Center.

## Creating an Opportunity from a Lead

Use this procedure to turn a lead into an opportunity.



## Prerequisites

- Display the lead in the Lead Center or on the Lead tab of the eBusiness Center.

### Steps:

1. If the lead does not have a description, enter it now in the Lead Name field. A lead name is required for opportunity creation.
2. Click **Create Opportunity**.
3. The application checks the lead information you have entered in the lead against information in all existing opportunities to see if a similar opportunity already exists.
4. If a potentially duplicate opportunity exists, then the Lead-Opportunity Linking window appears. To check for duplicate opportunities to see if you must create a new opportunity or link any items to an existing one, click **Detail**.
5. Scroll through the possible matches using the Next button. The number of potential matches is shown in the Matches Found field.
6. If the lead matches an opportunity on the right, move any new purchase items from the lead to the opportunity using the right arrow and click **OK**.
7. If none of the opportunities found match existing business objects, click **New Opportunity** to create a new opportunity.

## Creating an Opportunity Without a Lead in the eBusiness Center

Use this procedure to create an opportunity without a prior lead. An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order.

## Prerequisites

- Display the party in the eBusiness Center header.

### Steps:

1. In the View Details region, select the person, organization, or contact for the opportunity.

**Note:** When you create an opportunity for an organizational

contact the lead is recorded for the organization and the contact is listed as the primary contact for the opportunity.

2. Select the Opportunity tab.

3. Click **New**.

4. Enter the basic opportunity information.

**Note:** Depending on your implementation, the status of an opportunity determines whether it appears in your forecast or not.

5. Enter a close date for the opportunity. This date determines the forecast in which your opportunity information appears.

**Note:** You can enter a customer's purchase interests directly on the Opportunity tab, but you must scroll to view additional fields. If you want more room to work in, then click **Details** and make your entries on the Purchase Interest tab of the Opportunity Center instead.

6. If you want to enter customer purchase interests directly on the Opportunity tab, then follow the procedure Entering Purchase Interests, page 7-8.

7. Choose one salesperson as the owner of the opportunity. You must be the owner of the opportunity (or the owner's manager) to reassign a new owner.

8. Click **Save** on the toolbar.

9. If the Opportunity - Lead Linking window appears. Perform the following steps:

1. View the open leads using the Detail button to review details.

2. If you find a lead you want to link with the opportunity, then click **Link**.

3. When you are finished linking leads or if there are no leads you want to link to the opportunity, click **OK**.

10. To enter other detailed information for the opportunity, click **Details** to open the Opportunity Center and follow the procedure outlined in Entering Purchase Interests in an Opportunity, page 7-8.

## Linking an Opportunity to Leads

Use this procedure to link an existing opportunity to one or more leads.

### Steps:

1. View the opportunity in either the eBusiness Center or the Opportunity Center.
2. Activate lead linking in one of the following ways:
  - View the opportunity on the Opportunity tab in the eBusiness Center and choose **Link Opportunity to Lead** from the Actions menu.
  - View the opportunity in the Opportunity Center and choose **Link Opportunity to Lead** from the Actions menu.
  - View the opportunity in the Opportunity Center and on the Lead tab click **Link Opportunity to Lead**.

The Opportunity - Lead Linking window displays the current opportunity and all open leads for the customer that are not linked to an opportunity.

3. If you want to see the detail for a lead, select the lead and click **Detail**.
4. Select the lead or view the detail for the lead, and click **Link**.

The lead is linked to the opportunity.

## Displaying an Opportunity in the Opportunity Center

You can display an opportunity in the Opportunity Center in a number of ways:

- Use the Universal Search window to search for the opportunity using multiple search criteria.
- Display the opportunity in the eBusiness Center and then click **Details**.
- Double-click the opportunity in the Universal Work Queue, page 7-21.
- Navigate to the opportunity from the opportunity summary in the Dashboard tab of the eBusiness Center.

## Creating an Opportunity in the Opportunity Center

Use this procedure to create an opportunity in the Opportunity Center without a prior lead. If you want to create an opportunity from an existing lead, then follow the

procedure outlined in *Turning a Lead into an Opportunity*, page 7-4. An opportunity allows sales teams to track the sales process from the time a lead is qualified to the time you create the order.

**Steps:**

1. Navigate to the Opportunity Center.
2. Click **New**.
3. Enter the basic opportunity information in the fields provided. The fields include opportunity name, project name, source code, status, and budget.

**Note:** Depending on your implementation, the status of an opportunity determines whether it appears in your forecast or not.

4. Enter a close date for the opportunity. This date determines the forecast in which your opportunity information appears.
5. Click **Save** on the toolbar.

## Restrictions

The administrator has the right to limit the maximum number of days allowed to close an opportunity. The opportunity close date should fall within the allocated period set by the administrator (must not be greater than the system date + maximum number based on system settings).

An opportunity appears in the forecast if it meets the following criteria:

- The opportunity status is a status that is set up as forecastable.
- The close date at the purchase line level is within the forecast period.

## Entering Purchase Interests

Use this procedure to enter a customer's purchase interests into an opportunity. You can also enter competitor and competitor product information.

**Navigation**

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

**Steps:**

1. Display the opportunity in the Opportunity Center.

2. Select the Purchase Interest tab.
3. Enter the customer's purchase interests. For each purchase line:
  1. You can select a different operating unit than the one defaulted.
  2. Use the LOVs to find the product category, item description, or inventory item.
  3. If you do not know the exact product the customer is interested in, then you can use the Product Category code LOV to enter the customer's general purchase interest.
  4. Enter a Product Category if none appears.
  5. The Forecast Date automatically defaults to the Close Date of the opportunity. Changing this date does not affect the forecast unless Use Close Date is deselected. See *Splitting Up a Purchase Line for Inclusion in Multiple Forecasts*, page 7-23 for more information.
  6. Optionally, enter the Units of Measure and quantity of the item.
  7. Enter a currency amount of the purchase interest. This amount is added to the other purchase line amounts to give you the total purchase amount for the opportunity.
  8. Enter the sales credit. The sales credit is the amount included in your sales forecast.
  9. Under the Display LOV, select Competitors to add or view the competitors, competitor products, and the win/loss status.

## Restrictions

The administrator can limit the maximum number of days allowed to close an opportunity. The opportunity close date should fall within the allocated period set by the administrator.

## Entering Opportunity Contacts

Use this procedure to enter contacts into an existing opportunity using the Opportunity Center. You can enter contacts for customers of the types organization and person. You can enter the primary contact directly in the header of the Opportunity Center. If you want to add any additional contacts, then you must do so using the Contact tab.

## Prerequisites

- The contacts you want to add must already be in the database as the organizational contacts.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. If you want to add the primary contact for the opportunity, then:
  1. Use the Primary Contact List of Values (LOV) to select the contact.
  2. Select a role for the contact using the Contact Role LOV.
  3. Click **Save** on the toolbar.
3. If you want to enter additional contacts in the Opportunity Center, then:
  1. Select the Contact tab.
  2. Using the Last Name or First Name List of Values, add the contacts.
  3. If you want to designate a contact as the primary contact for the opportunity, then select the Primary check box. You can only designate one contact as a primary contact for the opportunity.
  4. Click **Save** on the toolbar.
4. If you want to enter a note for the contact, then click **Contact Note**.
5. If you want to enter a note for the customer, then click **Customer Note**.

## Restrictions

If you can view customer notes, then you can also view contact notes. If you can view contact note, you might not be able to view customer notes

## Changing the Owner of an Opportunity

Use this procedure to change the owner for an existing opportunity.

### Navigation

Navigator > Opportunity Center

1. Change the owner name by entering the new name, or by selecting a sales

representative from the LOV.

2. Click Save on the toolbar. The owner you indicate is also displayed on the Sales Team tab.

## Changing a Customer for an Opportunity

Use this procedure to change a customer for an existing opportunity. For example, you might find that you want to change a customer name after an opportunity has been initially created using a partner's name.

### Navigation

**Note:** If a quote or proposal exists for an opportunity, you cannot change the customer for that opportunity.

Navigator > Opportunity Center

Navigator > Universal Work Queue > My Opportunities (Sales Team)

Navigator > Universal Work Queue > My Opportunities (Sales Credits)

1. Change the customer name by entering the new name, or by selecting a customer name from the LOV.
2. Click Save on the toolbar.

## Classifying an Opportunity

Use this procedure to classify an existing opportunity. The Oracle Territory Manager program uses this classification to assign a sales team.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Classification tab.
3. Use the Lists of Values to classify the opportunity according to the classification scheme provided by your organization.
4. Click **Save** on the toolbar.

## Tracking Obstacles to an Opportunity

Use this procedure to track obstacles to a sale such as competitors.

## Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

## Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Obstacle tab.
3. Use the Issue LOV to enter an issue.
4. Select a Status from the LOV. Statuses include Preliminary, Expired, Lost, No Opportunity, or Won.
5. Enter a comment.
6. Click **Save** on the toolbar.

## Tracking Competition for an Opportunity

You can track the competitors and their products for each line item in an opportunity. Competitors are set up in Oracle Marketing. Enter competitor information on any of the following:

- The Win/Loss tab in the Opportunity Center
- The Purchase Interest tab in the Opportunity Center
- Pipeline Management

## Purchase Interest Tab

Select Competitors from the Display list. Enter competitor information for a purchase interest by selecting the line item and using the LOV to select the competitor product and competitor. You can also enter a win/loss status for the line item.

## Win/Loss Tab

Select the product category to identify the line item for which you want to add competitor information. Then select the competitor product and competitor from the LOV and add a win/loss status.

You can add decision information using the LOVs. Again select the product category to identify the line item.



## Pipeline Management

Select Competitors from the Display list. Enter competitor information for a purchase interest by selecting the line item and using the LOV to select the competitor product and competitor. You can also enter a win/loss status for the line item.

## Selecting Individuals and Sales Groups for the Opportunity Sales Team

Use this procedure to manually add sales agents and partners to an opportunity sales team. You can add individuals or entire sales groups to your team with this procedure.

Adding someone to the sales team makes them able to view an opportunity and add notes and tasks. Giving an individual full access status by selecting the Full check box enables them to modify all aspects of the opportunity.

If your organization has implemented the CRM Territory Manager module, then a sales team is assigned to an opportunity automatically. However you can use this procedure to override any automatic assignment by selecting the Keep check box.

### Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

### Steps:

1. Display the opportunity in the Opportunity Center.

2. Select the Sales Team tab.

The tab lists the current sales team.

If your organization has set up the Oracle territory management module, then the sales team is automatically assigned to the opportunity when you create it.

3. If you want to add the team members of an entire sales group, then:

1. Click **Add Resource Team**.

The Add Resource Team window appears.

2. Search for the sales team you want to add by entering its name or partial name in the Team Name and clicking **Find**. Use the percent sign to substitute for any missing characters.

The sales teams that match your search criteria display in the Team Name column.

3. Select the sales team by positioning the cursor in the sales team information.

4. The names of the individuals on the sales team display.
5. If you want to provide the new team members with rights to modify opportunity information, then select the Provide Full Access check box.
6. Click **OK**.

The sales group sales team is added to the opportunity sales team. Each individual has the Keep check box selected. This means that their assignment cannot be overridden by the Territory Manager module.

4. If you want to add an individual sales team member, then, in the Internal Sales region:
  1. Use the Last Name or First Name List of Values to add the sales agent.
  2. If you want this individual to have update privileges for this opportunity, then select the Full check box. All team members have view privileges.
  3. If you want to keep this individual regardless of the assignment made by the Oracle Territory Management module, then make sure the Keep check box is selected.
  4. Click **Save** on the toolbar when you have completed adding agents.
5. If you want to designate someone as the owner of the opportunity, then select the **Owner** check box next to the salesperson's name.
6. If you want to add a partner to the sales team, then in the External region use the LOV to select the partner. Use the Partner LOV to search for a partner. The search results enable you to view partner information including address, partner type, level, and certification level. Select a partner and click **OK**.

## Restrictions

The resource groups you can add to the sales team are set up by your application's administrator using the Resource Manager.

**Note:** In some implementations, it is possible for agents to lose access to customer, lead, and opportunity records they create or modify. Changing a zip code on a customer address, for example, can cause the Territory Management module to reassign that customer to another sales territory. This can result in an agent losing access to that information. If you want to prevent this from happening, make sure you select the Keep check box next to each name on the Sales Team tab to override territory assignment.

An opportunity can have only one owner. The owner has final responsibility for the opportunity and for updating the opportunity information. At the time the opportunity is created the user creating the opportunity is defaulted as the owner. The owner can be changed only by the current owner, the current owner's manager, or by a user with the privilege to change the owner.

## Viewing Partner Selection Criteria and Routing History for an Opportunity

Use this procedure to view information about what services partners are selling and the history of partner activity for the opportunity.

You can only view the routing history of one partner at a time although an opportunity can be assigned to multiple partners.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Partner tab.

The Preferred Partner field displays a partner associated with this opportunity, or you can use the Preferred Partner LOV to search for a partner. The search results enable you to view partner information including address, partner type, level, and certification level. Select a partner and click **OK**.

3. If you want to view a history of partner interactions for this opportunity including which partners were offered the opportunity, then click **Routing Details**.

## Routing an Opportunity to a Partner

Use this procedure to enter the criteria the routing manager will use to select a partner for the opportunity or, if you have the permission, route the opportunity to a partner directly.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Partner tab.
3. If you want to route the opportunity to a partner and have the permission to do so, then:
  1. Use the Preferred Partner List of Values (LOV) to select the partner you want to route to.
  2. If you want to bypass the channel manager approval, then select the Bypass CM

Approval check box. If you cannot select this check box, this means you do not have permission to do so.

3. Click **Submit Routing**.

The Routing Status field tells you the status of your request and whether the partner has accepted or not.

4. Click **Save** on the toolbar when you are finished.

## Viewing Leads Associated with an Opportunity

Use this procedure to view any leads that are linked to an opportunity.

### Steps:

1. Display the opportunity in the Opportunity Center.

2. Select the Lead tab.

The leads that are linked to this opportunity are listed.

3. If you want to view any of the leads, then:

1. Select the lead.

2. Click **Lead Center**.

3. If you want to view details of multiple leads in separate Lead Centers, then select the Display Multiple Lead Centers check box.

## Freezing an Opportunity

Use this procedure to freeze an opportunity so that modifications cannot be made to the header and purchase interest tab information. After an opportunity is frozen, nobody, including the person who froze the opportunity, can make any modification unless they obtain permission from the application administrator.

### Prerequisites

- You must be on the sales team for the opportunity to freeze it.

### Steps:

1. Display the opportunity in the Opportunity tab of the eBusiness Center or in the Opportunity Center.

2. Select the Freeze check box.
3. Click **Save** in the toolbar.

## Splitting Up an Opportunity If Only Some Items Can Close

Use this procedure to split up an opportunity so that you can close on some purchase items while others remain open. You first make a copy of the opportunity and then specify the items you want to split by making deletions from the copy and the original.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Click **Copy**.  
The Copy Opportunity window appears.
3. Click **Copy**.  
The Opportunity Center displays the copy you have made. The opportunity number which is automatically changed to the next available number.
4. Rename the copy you have made.
5. Using **Clear Record** from the toolbar, delete from the copy the purchase items which are to close.
6. Click **Save** in the toolbar.

## Deleting Purchase Items from an Opportunity

Use this procedure to delete purchase items from an opportunity.

### Prerequisites

- You must be designated as a team leader on the sales team for the opportunity.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. Select the purchase item you want to delete.

4. Click **Delete** on the toolbar or choose **Delete** from the Edit menu.

## Copying an Opportunity

Use this procedure to copy an opportunity. You will want to copy an opportunity if you want to split an opportunity, for example, or if different customers want to purchase the same set of items.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Click **Copy**.  
The Copy Opportunity window appears.
3. If you want the copied opportunity to go to a different party type, then select the party type from the LOV.
4. If you want the copied opportunity to go to a different customer, then select the customer using the Customer LOV.
5. Optionally, select an address using the Address LOV.
6. Enter a name for the opportunity. The default is "Copy of" (unless your administrator changed this to something else) followed by the original opportunity name.
7. Select the check boxes corresponding to the information you want to copy to the new opportunity. The header information is copied automatically.
8. Click **Copy**.  
The Opportunity Center displays the copy you have made. The opportunity number which is automatically changed to the next available number.

## Updating Opportunities

You can update opportunities in one of three ways:

- Update opportunities one at a time using the Opportunity Center.
- Update the win probabilities, sales stages, close dates, and channel fields for a list of opportunities using the Opportunity Mass Update window. You must create a list using the Universal Search window and update all opportunities on that list to the values you enter in the Update Mass Opportunity window.

- Updating your pipeline; this method allows you to query up the opportunities you want to modify and modify each opportunity individually in one window.

## Performing a Mass Update of Opportunities

Use this procedure to update a list of all opportunities you want to update with the same value.

Use this procedure to update the win probabilities, sales stages, close dates, and channel fields for a list of opportunities. If you want to open multiple opportunities in one window so that you can update their values one at a time, then you must instead use the Pipeline Management window. See Updating Your Pipeline, page 7-19.

### Prerequisites

- You must first use Universal Search to create a saved list of opportunities you want to update, page 3-5 to update.

#### Steps:

1. Navigate to Opportunity Mass Update.  
The Mass Update of Opportunities window opens.
2. Use the Lookup Name List of Values (LOV) to find your saved list of opportunities you want to update.
3. Click **Search**.
4. Select the opportunities you want to update by selecting the Select check box for each.
5. Make entries in the win percentage, sales stages, close dates, and channel fields for each entry.
6. Click **Mass Update**.

## Updating Your Pipeline

You can change multiple opportunities by entering different values for each in a grid format and then saving.

Use this procedure to update multiple opportunities at the same time using the pipeline management window.

#### Navigation

Navigator > Pipeline Management

**Steps:**

1. From the Navigator, select Pipeline Management.

The Pipeline Search Criteria window appears.

2. Enter your search criteria.

- You can use the percent sign to substitute for any missing characters.
- You can enter one value or a range of values for win probability, close date, total amount, and sales credit amount.
- Select one of the Credits radio buttons to search for opportunities with forecast credits, other (non-revenue) credits, or all for the agent listed in the Sales Agent field.

**Note:** The application uses the logical AND to connect your search criteria. Each field you enter restricts your search further.

3. If you belong to or manage multiple sales groups, then you can restrict the search to a particular sales group by selecting that sales group from the Sales Group List of Values (LOV).
4. If you manage a sales group, you can restrict the search to a single member of the sales group. To do so, use the Sales Agent field LOV to enter the name of the subordinate.

**Note:** If you do not manage a sales group, you can only search for your own opportunities. In this case, your name populates the Sales Agent field automatically.

5. Click **Search**.

The Pipeline Search Results window appears displaying the results of your search.

6. If you must modify the search, then click **Return to Search** to return to the Pipeline Search Criteria window.
7. If you want to update the win probability (Win %), status, close date, channel, sales stage, or close reason for an opportunity, then make your entry in the list of opportunities.

**Note:** You must use the scroll bar to reveal the Sales Stage and



Close Reason fields.

8. If you want to view the total revenue amount of the opportunities listed, then click **Calculate**.
9. If you want to change the purchase interest for an opportunity, then:
  1. Select the opportunity you want to modify from the list at the top of the window. You can click in any field to select an opportunity.  
  
The purchase interest information for that opportunity appears. Select the product information from among the multiple operating units you can access.
  2. Make your modifications.  
  
**Note:** You must use the scroll bar to reveal the quantity, purchase amount, and other fields.
10. If you want to modify the sales credit for individual items in an opportunity, then:
  1. Select the opportunity you want to modify from the list at the top of the window.  
  
The purchase interest information for that opportunity appears.
  2. Select the item.
  3. From the Display drop-down list, select Forecast Credit or Other Credit.
  4. Modify the credit amounts for the item.
11. Under the Display LOV, select Competitors to add or view the competitors, competitor products, and the win/loss status for a selected purchase interest.
12. Click **Submit Changes** to save your work.
13. If you want to close the window, then from the File menu, choose **Close Form**.

## Working With Opportunities in the Universal Work Queue

The Universal Work Queue displays a list of opportunities for quick navigation and update. There are two display options for the Universal Work Queue, one with the queue listed on the left side of the window, and the other with the choices in a cascading menu.

**Steps:**

1. In the Select Items list or the Universal Work Queue nodes, select either My Opportunities (Sales Credits) or My Opportunities (Sales Team). Optionally, you can select your choice and skip steps 2 and 3.
2. Select one of the following options:
  - Closing Within 30 Days: Open opportunities scheduled to close in the next 30 days
  - Closing Within 90 Days
  - Closing Within 6 Months
  - Closing Within 1 Year
  - All: All open opportunitiesThe next selection list appears.
3. Select a status.

The window displays a list of opportunities that match the selected criteria and displays related note history for any selected opportunity.
4. If you want to update an opportunity, then perform the following steps:
  1. Select the opportunity and select your choice from the Action drop down list. If you select more than one opportunity, then some actions are not available.
  2. Enter or select your changes.
  3. Optionally, enter a note.
  4. Click **Apply**.

Your changes are saved for one or more selected opportunities.
5. Optionally, double-click in a row to open the opportunity in the Opportunity Center.

**Restrictions**

The Update Opportunity region can be customized by the Universal Work Queue administrator. The administrator can create new actions in the Action drop down list, disable seeded actions, change the order of actions in the list, and control the order of notes in Note History.

## Splitting Up a Purchase Line for Inclusion in Multiple Forecasts

Use this procedure to split up an opportunity purchase amount so that it appears in multiple forecasts over a period of time. This is called a rolling purchase line. For example, if you are selling a \$1200 service on a subscription basis and your customer makes twelve monthly payments, you can allocate the total over the twelve months so that only \$100 appears in each monthly forecast.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. In a blank purchase interest line, place your cursor in the Amount field.
4. Choose **Rolling Purchase Lines** from the Actions menu.  
The Rolling Purchase Lines window appears.
5. The forecast date defaults to the close date of the opportunity. Changing this date also changes the close date.
6. Enter the number of periods you want to copy this purchase line into.
7. Enter the interval for the periods. This determines the forecast dates for each period.
8. If you know the Inventory Item number of the purchase, then use the Inventory Item LOV to enter it. The Product Category and Item Description fields fill in automatically.
9. If you do not know the Inventory Item number, but you know at least a partial description of the item, then use the Description LOV to search for the item by Item Description.  
When you enter an item, the Product Category and Inventory Item fields fill in automatically.
10. If you do not know the exact product the customer is interested in, then you can use the Interest Type and Primary and Secondary interest code Lists of Values (LOVs) to enter the customer's general purchase interest.
11. Enter an Interest Type if none appears.

**Note:** Interest Type is required.

12. The Source Code field defaults to the marketing source code entered in the header for the opportunity as a whole. If this purchase line is related to a different source code than the opportunity header, then make another selection.
13. Optionally, enter the Units of Measure and quantity of the item the customer is purchasing in each of the periods.
14. Enter the amount of the purchase to display for each period. This is the amount included in each forecast and added to the other purchase line amounts to give you the total purchase amount for the opportunity.
15. Click **Add Lines**.  
  
The application creates purchase lines in the Purchase Interest tab corresponding to the number of periods. Each new line is identical except for the Forecast Date.
16. Click **Save** on the toolbar.

## Managing Opportunity Forecast Amounts

Oracle TeleSales enables you to enter an overall forecast total for an opportunity (in the Forecast Amount field at the opportunity header level), as well as enter the amounts at the opportunity product line level (Best, Forecast and Worst fields for each product line). Also, you can capture forecast amounts for each opportunity product line that enable agents to receive sales credits at the non-revenue level. These amounts do not affect the revenue forecast amounts associated with the product line.

The Forecast Amount and Best, Forecast and Worst fields are interactive. You can add or modify the Forecast Amount for an opportunity at the opportunity header level. The value in the Forecast Amount field is the sum of the Forecast amounts for the opportunity product lines. When you change this amount, it causes the recalculation of the Best, Forecast, and Worst amounts at the product line level. The recalculated amount is distributed proportionally over the Best, Forecast and Worst fields. Also, you can modify the Best, Forecast and Worst amounts that are displayed at the product line level for an opportunity. When you change these amounts, the value in the Forecast Amount field recalculates.

You can always manually override the automatically calculated amounts for Best, Forecast, and Worst, as well as the Forecast Amount.

### Navigation for Forecast Amount

Navigator > Opportunity Center

Navigator > eBusiness Center > Opportunity

Navigator > Universal Work Queue

Navigator > eBusiness Center > Navigate To > At a Glance > Opportunities

### Navigation for Best, Forecast and Worst Amounts

Navigator > Opportunity Center > Purchase Interest

Navigator > eBusiness Center > Opportunity

Navigator > Universal Work Queue

Navigator > Opportunity Center > Purchase Interest > Display > Other Credits (for non-revenue)

### **How Forecast Amount Values are Calculated**

Forecast Amount values are the sum of the Forecast values for the opportunity purchase lines. The value in the opportunity Status field affects the value in the Forecast Amount field in that when an opportunity changes to a nonforecastable status, the Forecast Amount field goes blank and is read only. If the opportunity status changes back to forecastable, the Forecast Amount field is again calculated.

### **How Best, Forecast and Worst Values are Calculated**

The Best, Forecast, and Worst amounts are initially calculated based on system settings, but are recalculated when you enter the Forecast Amount at the opportunity header level and save your changes.

Amounts for non-revenue sales credits are calculated in the same way as revenue sales credits. Any manual updates that you make to the Best, Forecast, and Worst amounts will override the values that result from any defaulting that has been set for your organization.

## **Prerequisites**

- The opportunity must be in a forecastable status.

### **Steps:**

1. Add or modify the Forecast Amount or Best, Forecast and Worst fields as needed.  
The application defaults amounts in these fields depending upon win probability and status of the opportunity.
2. Click Save in the toolbar.
3. Navigate to the locations of the Forecast Amount for Best, Forecast, Worst to verify the forecast amounts.

## **Using Personal Opportunities Lists**

When you perform a Universal Search using Opportunity as the criteria, you save the search results as a list in the Saved Results window. This creates a personal opportunity list of your customers, which you can view of update in the Universal Work Queue.

With the help of personal opportunities lists, you can manage all those opportunities

that you want to work on currently. After you create your personal opportunities lists, work on the desired opportunity from the lists, and use the work panel to update the lists.

Use this procedure to update the personal opportunities lists.

**Steps:**

1. Launch the Universal Work Queue window from the Navigator.
2. Select the work type as **Personal List - Opportunities**.
3. If you want to update an opportunity, a task, or a note, then select an action from the drop-down list using the work panel.
4. Optionally, double-click in a row to open the opportunity in the Opportunity Center.
5. Click **Apply**.

The personal opportunities list is updated based on the action that you selected in the work panel. You can also view all the opportunity notes in the Universal Work Queue window.

## Entering Sales Credit for Purchases in an Opportunity

Use this procedure to assign sales agents and partners both revenue and non-revenue sales credits for the individual purchases in an opportunity. You must enter the sales agents and the sales credits they are to receive separately for each item in the opportunity.

**Steps:**

1. Select the Purchase Interest tab.
2. Using the select field to the left of a purchase item, select the purchase item for which you want to assign sales credits.  
  
Any sales agents already receiving credit for this item are listed in the lower portion of the tab.
3. From the Display drop-down list, select the type of sales credit you want to assign for this item:
  - **Forecast credit:** Revenue credit amounts that show up in the forecasting module of Oracle Sales.
  - **Other Credit:** Non-revenue credit. For example, credit toward sales quotas.

4. If you want to modify the existing credits that agents or partners are to receive for the item, then:

1. Modify the numbers in the % field for the agent.
2. If you are modifying forecast credits, then you must modify the credit percentages for other agents and partners so that the total adds up to 100 percent.
3. Click **Save** on the toolbar.

**Note:** The percent amounts of forecast credits you assign to sales team members and partners must add up to 100 because you are adding up actual revenue. For other non-revenue credits any percentage is allowed.

5. If you want to add any additional salespeople who are to receive sales credit for this item, then:

1. Use the Sales Agent List of Values (LOV) to enter a sales agent. If no blank lines display, then use the New button in the toolbar to add information.
2. In the % field, enter the number corresponding to the percentage of commission the individual is to receive.

Any new sales person you add here is automatically added to the sales team for the opportunity.

3. If you are assigning revenue credit, then adjust the credit percentages of the other sales agents and partners for this item so the total adds up to 100 percent.
4. Click **Save** on the toolbar.

6. If you want to add any additional partners who are to receive sales commissions for the sale of this item, then:

1. Use the Partner LOV to search for a partner. Select a partner and click **OK**.
2. In the % field, enter the number corresponding to the percentage of commission the individual is to receive for this item. Do not enter a percent sign.

**Note:** The percent amounts of revenue credits you assign to sales team members and partners must add up to 100. For non-revenue credits any percentage is allowed.

3. If you are entering revenue credits, then adjust the credits of the other sales agents

and partners, so the total adds to 100 percent.

4. Click **Save** on the toolbar.

## Viewing Sales Credit Totals for an Opportunity

Use this procedure to view the total sales credit sales team members are to receive on all the purchase items in an opportunity.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Sales Team tab.
3. Click **View Credit Total**.

The Opportunity Credit Total window appears. The window lists both the revenue and non-revenue credit totals for each agent and partner for this opportunity.

**Note:** The terminology in this window is different from that used in the Purchase Interest tab. The label Quota Sales Credit refers to Forecast Credit (actual revenue). The label Non-Quota Sales Credit refers to Other Credit. (non-revenue)

## Closing an Opportunity So You Can Receive Sales Credit

Use this procedure to enter or view closing information for an opportunity. To receive sales credit and to assure accurate pipeline reports, you must close an opportunity and enter a close reason after placing an order for a customer.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Win/Loss tab.
3. Use the Close Reason List of Values (LOV) to enter the close reason.
4. If this opportunity has been won, then the resulting orders are listed in the Win region.
5. If you lost the order, then enter the competitor using the LOV provided and any comment.



6. If the opportunity resulted in a sale by a reseller, then choose Reseller Information from the Actions menu and add the information.
7. Enter the rest of the closing information for the opportunity. Depending on your implementation you might be required to enter:
  - Win Probability
  - Close Date
  - Sales Stage
8. Change the Status. If you made the sale, then change the status to won.

**Note:** To change the status of an opportunity to Won, Lost, or No Opportunity, you must enter the close reason first.
9. Click **Save** on the toolbar.

**Note:** Changes made in the Opportunity Center are not immediately reflected in the Opportunity tab. You must refresh the eBusiness Center display first.

## Viewing the History of an Opportunity

Use this procedure to view a lot of all activities and changes made to an opportunity.

### Navigation

Navigator > Opportunity Center

Navigator > eBusiness Center > Opportunity Tab

Navigator > Pipeline Management

### Steps:

1. Display the opportunity in the Opportunity Center, eBusiness Center, or Pipeline Management Center.
2. From the Actions menu, choose **Opportunity History**.

The Opportunity Log window list the history of changes made to the opportunity.



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# Proposals, Quotes, and Orders

This chapter covers the following topics:

- Overview of Proposals, Quotes, and Orders
- Viewing and Modifying Quotes
- Working with Orders
- Creating a Quote Without a Lead or Opportunity
- Viewing a Customer's Quotes, Proposals, and Orders for a Specific Opportunity
- Creating a Quote from an Opportunity
- Creating a Proposal from an Opportunity
- Creating a Proposal for a Customer

## Overview of Proposals, Quotes, and Orders

Use the Proposals, Quote, and Order tabs to view proposals created in Oracle Proposals, quotes created in Oracle Quoting - Forms, and orders placed with Oracle Order Management. You can launch Oracle Proposals from the Proposals tab to create new proposals, launch Oracle Quoting - Forms from the Quote tab to create new quotes, and launch Oracle Order Management from the Order tab to create new orders.

## Viewing and Modifying Quotes

Use this procedure to view or modify a quote for a customer.

### Steps:

1. If you want to view the quotes for a consumer, then, in the View Details region, select the person's name.
2. If you want to view the quotes for an organization, then, in the View Details region,

select the organization's name.

3. Select the Quote tab.
4. In View, select **Quotes**.
5. Select a quote from the list.
6. Click **Details**.

Oracle Quoting - Forms appears displaying the quote. Follow the procedures outlined in the Oracle Quoting - Forms documentation to modify quotes.

## Working with Orders

Use this procedure to view a list of orders for the customer displayed in the eBusiness Center. You can also update an existing order or create a new order. You can view the details of orders owned by the operating units to which you have access. The Order Details column displays Yes if you can view the details.

### Prerequisites

- Display the party in the eBusiness Center header.

#### Steps:

1. If you want to view the orders of a consumer, then, in the View Details region, select the person's name.
2. If you want to view orders for an organization, then select the name of the organization.
3. If you want to view orders for which the contact is the order customer contact, then, in the View Details region, select the person and organization relationship.
4. If you want to view orders that belong to a specific account, then select the account in the header and select the account in the View Details region.
5. Select the **Ordertab**. This will display the orders belonging to your accessible operating units.
6. Optionally, change the order creation date range of orders to view.
7. Optionally, select to filter records by order status, order type, or order source. If you selected a filter, then select a value for the filter.

8. Click **Apply**.
9. If you want to view the quote used to create the order, then click the link in the Order Source column.  
  
If the quote was created in Oracle Quoting, then the quote opens in the Oracle Quoting window.
10. If you want to view details or update order information, then click **Detail**.  
Alternatively, you can double-click an order.
11. If you want to create a new order, click **New**.

## Related Topics

*Oracle Order Management User Guide*

## Creating a Quote Without a Lead or Opportunity

Use this procedure to create a quote for a consumer or an organization directly without using an opportunity to track the sales process.

### Steps:

1. If you are creating a quote for a consumer, then, in the View Details region, select the person's name.
2. If you are creating a quote for an organization, then, in the View Details region, select the organization's name.
3. Select the Quote/Order tab.
4. Click **New**.

The Quoting window opens. Follow the instructions outlined in the Oracle Quoting - Forms documentation for preparing quotes.

## Viewing a Customer's Quotes, Proposals, and Orders for a Specific Opportunity

Use this procedure to view a customer's past orders, proposals, and quotes.

### Navigation

Navigator > Opportunity Center

Navigator > Universal Work Queue > Get Work for an opportunity

**Steps:**

1. Display the opportunity in the Opportunity Center.
2. Select the Quote/Order tab.
3. If you want to view previous orders from the customer, then:
  1. Select **Orders**.

The customer's orders in accounts receivable are listed in the tab. The orders displayed are the orders belonging to your accessible operating units.
  2. Select an order you want to view.
  3. Click **Details** to view details of the order in a separate window in Oracle Order Management.
4. If you want to view quotes for this customer, then:
  1. Select **Quotes**.

The customer's quotes are listed in the tab.
  2. Select a quote you want to view or modify.
  3. Click **Details** to view details of the quote in an Oracle Quoting - Forms window.
5. If you want to view proposals for the opportunity displayed in the header, then:
  1. Select the Proposals tab.
  2. Click **Details** to view or update the details of the proposal in a separate window in Oracle Proposals.

## Creating a Quote from an Opportunity

Use this procedure to create a quote from an opportunity. You must enter an inventory item as a purchase interest before you can create a quote.

**Steps:**

1. Display the opportunity in the Opportunity Center.
2. Select the Purchase Interest tab.
3. Enter inventory items and quantities for the purchase interest.

4. Click **Create Quote** in the Opportunity Center header.

The Quote Creation window opens. Follow the instructions outlined in the Oracle Quoting - Forms documentation for preparing quotes and booking orders.

5. You must close the opportunity so you and others on the opportunity sales team can receive sales credit.

## Creating a Proposal from an Opportunity

Use this procedure to create a proposal from an opportunity displayed in the Opportunity Center. You can create a proposal for a read-only opportunity as well as for an opportunity that you can modify. No interaction is recorded when you create a proposal. Only the creator of a proposal can modify it.

### Steps:

1. Display the opportunity in the Opportunity Center.
2. Select the Proposals tab.
3. Click **New**.

Oracle Proposals opens.

Follow the instructions in the *Oracle Proposals User Guide* for creating the proposal.

## Creating a Proposal for a Customer

Use this procedure to create a proposal for a customer displayed in the eBusiness Center header. No interaction is recorded when you create a proposal. Only the creator of a proposal can modify it.

### Prerequisites

- Display the party in the eBusiness Center header.

### Steps:

1. Select the correct View Details.
2. Select the Proposals tab.
3. Click **New**.

Oracle Proposals opens.

4. Follow the instructions in the *Oracle Proposals User Guide* for creating the proposal.



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## Interacting with Customers

This chapter covers the following topics:

- Overview of Interacting with the Customer
- Displaying a Summary of Customer Data
- Using the At A Glance Window
- Starting a Web Collaboration Session
- Entering the Marketing Source Code in the eBusiness Center
- Launching a Script for Your Customer Interaction
- Contacting Lists of Customers Supplied by Marketing
- Working with Personal Contact Lists
- Viewing Interactions
- Viewing What Marketing Activities are Targeted to Your Customer
- Viewing an Organization's Products Under Service Contracts
- Viewing Contracts a Customer Has with Your Organization
- Viewing Accounts a Customer Has with Your Organization
- Sending an E-mail to a Customer
- Using the Collection Tab
- Creating a Quick Service Request
- Recording Your Interactions with a Customer
- Wrapping Up an Interaction with a Customer
- Restricting Interactions

## Overview of Interacting with the Customer

An interaction records customer-related activities in the eBusiness Suite of applications. Each interaction includes an identifier, the time and date the interaction took place, the individual who contacted the customer, and information about the outcome of the interaction. When you end an interaction you are asked to enter information about the outcome of the interaction.

This topic covers:

- Overview, page 9-2
- Starting and ending your interactions, page 9-3
- Wrap up, page 9-4
- Simultaneous Interactions, page 9-4
- Viewing Interactions, page 9-4

### Overview

Oracle TeleSales can track agent interactions with customers and the different activities within those interactions. The activities an interaction can track includes the modifying and closing of leads and opportunities, the enrollment of contacts in events, the mailing of collateral, the placing of calls to customers, and so on.

The interaction records an activity whenever an agent:

- Creates a new party of any type
- Creates a lead
- Ranks a lead
- Declines a lead
- Creates an opportunity
- Closes an opportunity
- Enrolls customers or prospects in an event
- Cancels enrollment
- Sends collateral
- Creates a task

You can start an interaction at any time while working in the Opportunity Center, the Lead Center, or the eBusiness Center, by clicking the Start Interaction button on the toolbar. When you end the interaction by clicking on the Wrap Up button, you can enter information about the outcome of the interaction in the Interaction Wrap Up window. The interaction lists all the activities you performed.

Your implementation team can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever an event occurs that supports interaction tracking. Automatic tracking ends when you search for a new party, change parties, or close the form where the interaction began.

Your implementation team can set up interactions to require you to record the outcomes of your interactions with customers in a wrap-up window or to record a default outcome automatically.

Interaction activities recorded for any of the party types which make up a party relationship are recorded as being part of the same interaction.

## Starting and Ending Your Interactions

Depending on your implementation, some interactions, such as a call to a customer, start an interaction automatically. You must complete querying your party before the interaction starts automatically. For example, if you selected the party type of Party Relationship and only query the organization name, then the interaction does not start. Or you can start an interaction yourself by choosing Start Interaction from the Tools menu.

You can end the interaction by clicking the Wrap Up button on the toolbar, or you can wait for the application to prompt you to end the interaction automatically. This happens whenever you switch parties (change customers) and update the information.

**Note:** Merely switching parties does not automatically prompt you to end an interaction with the previous party. You must update the new information first. This allows you to view information from other parties without having to restart the interaction.

You can end an inbound call automatically using default values for the wrapup by clicking Next Call in the eBusiness Center header.

If you choose to start and end an interaction manually, use the Start Interaction and Wrapup buttons on the toolbar. These are the two buttons with a stop light icon: a green stop light for starting and red for ending the interaction.

You can tell when an interaction is being recorded by examining the start and end interaction buttons in the toolbar. If the Start Interaction button is disabled and the Wrapup button is enabled, this means that your interaction is being recorded.

## Wrap Up

When you end an interaction, you are asked to enter information about the outcome of the interaction in the Interaction Wrap Up window. You can enter a note for the interaction, or create a task.

If you are using Oracle Advanced Outbound, then you can also schedule a call back in the Interaction Wrap Up window. Choose Call Back for the interaction result, enter the reschedule date and time, and click either End Interaction or Next Call to save the interaction.

## Simultaneous Interactions

You can start another interaction while the first interaction is still open. Each Center can track only one interaction at a time, but you can open additional centers and start interactions in each. For example, while you are talking to a customer and viewing customer information in the eBusiness Center you receive a call from a second customer. You open a new eBusiness Center for that customer and both interactions are recording at the same time.

In the eBusiness Center, a second interaction does not start if the first party is a party relationship type and the second party queried in a new eBusiness Center is either the person or organization related to the party relationship in the first eBusiness Center.

## Viewing Interactions

The list of interactions you can obtain on the Overview tab of the eBusiness Center gives you an audit trail of all of the interactions with customers in any eBusiness Suite application. For example, if someone else in your sales organization makes a change to an opportunity you are working on, then you will find a record of the interaction here.

Double-click the interaction entry to view details.

## Displaying a Summary of Customer Data

Use this procedure to view a comprehensive overview of customer data pertaining to tasks, leads, opportunities, contracts, quotes, orders, service, and installed base.

### Prerequisites

- Display the party in the eBusiness Center header.
- The following areas of the Dashboard obtain information from other implemented modules in the Oracle eBusiness Suite:
  - Leads and Opportunities: Oracle Sales

- Orders: Oracle Order Management
- Service Requests: Oracle Service
- Quotes: Oracle Quoting
- Installed Base: Oracle Installed Base

### Steps:

1. In the View Details region, select the option corresponding to the party or account you want to view. For example, if you want to view data on a consumer, then select the individual's name. If you want to view data about an organization, then select the name of the organization.
2. Select the Dashboard tab.  
  
The tab displays data on your customer. Use the scroll bars to view all of the available data categories.  
  
This data is current as of the date and time displayed in the Last Refresh Date field. Click **Refresh** to update the data as needed.
3. In the View By drop down list, select whether to view information by customer or account.
4. Double-click an item in the Dashboard tab you want to examine in more detail. Or click it once and click **Details**. Note that you cannot access item details for quotes, collections, or orders if you do not have access to the operating unit associated with the item.
5. Double-click any row in the Drilldown list to display the item in the eBusiness Suite application that created it.

## Using the At A Glance Window

View a customer's recent activities in the At A Glance window and launch an action from the window, such as opening the eBusiness Center, creating a lead, and so on. The window is configured by your administrator.

The date and time the information was last updated is displayed when you mouse over the labels in the tables. Notes are real time.

Use this procedure to view activities for a customer and start an action, such as creating a lead.

### Navigation

eBusiness Center > At A Glance icon in the toolbar > At A Glance window displays

party in the header

eBusiness Center > Navigate To > At A Glance > At A Glance window displays party in the header

Lead Center > At A Glance icon in the toolbar > At A Glance window displays party in the header

Lead Center > Navigate To > At A Glance > At A Glance window displays party in the header

Universal Search > Party Search > Select result and At A Glance check box

Universal Search > Key Customer Search > Select result and At A Glance check box

### **Steps:**

1. Navigate to the At A Glance window.

The Summary section of the window lists notes for the party for objects like leads, opportunities, tasks, product interests, or quotes, depending on the configuration set up by your administrator:

2. Click the plus sign next to any object you want to view.

The hierarchy expands to list the available categories of the object. For example, the categories of leads can be new leads and qualified leads.

3. Select the category you want to view and double-click.

The table for the selected objects expands and lists all records within the selected category. For example, the Leads table lists all new leads. In the case of quotes, all quotes are listed, but you can only access the quotes that belong to your accessible operating units.

4. Double-click the information to view details.

5. Optionally, use the View selection list above the table to change categories.

6. Optionally, click the Expand icon to make the selected table the size of the screen.

7. Optionally, change the party for which you want to view notes. For example, if you are viewing a party relationship, then you can view notes for the contact, the organization, or for the person.

8. Optionally, select the action you want to perform. Available actions depend upon your implementation. Also, you will not see actions for any tabs you have hidden in the eBusiness Center.

## Starting a Web Collaboration Session

You can use a web collaboration application to hold a web meeting with a customer. Use this procedure to start a web collaboration session. This function is made available by your administrator.

### Prerequisites

- The eBusiness Center or Opportunity Center window must be open.

#### Steps:

1. From the Actions menu, choose **Web Collaborate**.
2. Either start or join a meeting.

An interaction starts recording when you start a web collaboration session.

## Entering the Marketing Source Code in the eBusiness Center

Use this procedure to enter the marketing source code for your customer. The source code can represent a marketing campaign, an offer, a promotion, or other marketing activity. You must enter a source code before preparing quotes or launching scripts.

### Prerequisites

- Display the party in the eBusiness Center header and select the appropriate party in the View Details region.

#### Steps:

1. Select the Overview tab.
2. If the caller does not know the source code name, then click **Search** and search for the source code using the Universal Search window.
3. If the caller knows the source code name, then enter it using the Source Code List of Values. Depending on your implementation, you can double-click the source code or source name to open Oracle Marketing.

## Launching a Script for Your Customer Interaction

Use this procedure to launch a script to guide you in your interaction with a customer or prospect. If you are unable to complete a script with a customer, then the application

keeps track of the suspended script so that you or another agent can resume the script on a later call.

## Prerequisites

- You must display the customer or prospect in the eBusiness header and select the appropriate party in the View Details region.

### Steps:

1. In the eBusiness Center, select the Overview tab.
2. If the caller knows the name of the source code, then enter it using the Source Code List of Values.
3. If the caller does not know the source code name, then click **Search** and search for the marketing source code using other criteria, such as the source code name or the medium where the promotion is run.
4. If the View Script button is enabled, click it to launch the script.  
  
If there is only one script available and no suspended scripts, then the script launches. If there is more than one script or a suspended script, then the Script Chooser Window lists available scripts and suspended scripts. Depending on your system settings, you might be able to resume scripts that were suspended by other agents.
5. If the View Script button is disabled, this means no specific script has been associated with this source code and there is no default script. In this case, you can view a list of all of the available scripts. Choose **All Scripts** from the Navigate To menu.
6. If an appropriate script is available, double-click to launch the script.
7. If you want to search for suspended scripts, then enter or change dates and contact information and click Display.
8. Double-click the script you want to use or click **Cancel**.

## Contacting Lists of Customers Supplied by Marketing

You can use the Universal Work Queue to contact lists of customers passed to you by the marketing team using Oracle Marketing. There are two kinds of lists: a generated list that automatically assigns resources and a list with manually assigned resources. The manually assigned marketing lists are imported by an administrator using Oracle Marketing. Use this procedure for contacting customers passed on to you from



marketing.

## Prerequisites

- Campaign is created and is active and within the start and end date range.
- Campaign activity is associated to the campaign and is active and within the start and end date range.
- A target list is generated for the campaign activity.
- The campaign activity is assigned to the agent or a group of agents.
- The campaign activity must be of activity type Direct Marketing and activity Telemarketing.
- All contacts must be in the customer database (Trading Community Architecture).

### Steps:

1. In the Select Items list or the Universal Work Queue nodes, highlight either Marketing Lists or Marketing Lists - Manual Assignments.  
The available lists appears.
2. Select the marketing list you want to use.
3. If you want to make a call, then select the party you want to contact and make your call.
4. Optionally, double-click the customer name to view customer information in the eBusiness Center.
5. Select the information to update. (Use Ctrl-click to select additional records.)
6. Update the records by selecting an action.
7. Enter or select related information. You can enter a note.
8. Click **Apply**.  
Your changes are saved for one or more selected records. The records are marked as completed and disappear from your marketing list.

## Working with Personal Contact Lists

When you perform a Universal Search using Party Relationship or Person as the criteria, you save the search results as a list in the Saved Resultswindow. This way you

have created a personal contact list of your customers, which can be viewed and updated in the Universal Work Queue.

With the help of personal contact lists, you can easily manage your personal call lists. After you have created your personal contact lists, make calls from the lists and use the work panel in the Universal Work Queue to update the list.

Use this procedure to update your personal contact lists in the Universal Work Queue.

### **Steps:**

1. Launch the Universal Work Queue window from the Navigator.

2. Select the Work Type as **Personal List - Contacts**.

The personal contact list appears in the Universal Work Queue window.

3. If you want to update the information that you are currently working on, then select an action from the drop-down list using the work panel.

The work panel in the Universal Work Queue helps you to update the records present in your personal contact lists. You can perform various actions through the work panel, for example, you can create a note, create a lead, create an opportunity, call back the customer, request a data issue for Sales for **No Contact** or **Bad Data - Wrong Phone Number**, or duplicate party in your personal contact list. See *Contacting Lists of Customers Supplied by Marketing*, page 9-8.

4. Click **Apply**.

The personal contact list is updated based on the action that you selected in the work panel.

## **Viewing Interactions**

Use this procedure to view interactions your organization has had with a consumer, organization, an organizational contact, or a party who owns the selected account. Interactions track all changes to customer information and all contacts made in any of the eBusiness suite of applications between agents of your organization and the customer.

### **Steps:**

1. In the eBusiness Center, select an option in the View Details region corresponding to the party you want to view interactions for.
2. Select the Overview tab.
3. Enter a date range in the View Interactions From and To fields. If you do not enter a date range, then the application displays records for a set default number of

months.

4. Click **Display**.

The tab displays the interactions for the party for the date range you provided. The interactions are organized by date. You can open each date node by clicking on the + sign to reveal the activity for the date.

The Object field provides the unique identifier for the interaction. For example, if the interaction involved an opportunity, then the identifier represents the opportunity number.

The Handler field displays the eBusiness Suite application where the interaction occurred.

You might have to scroll over to view the User Name, the name of the user who had the interaction with the customer.

5. If you want to view the information linked to the interaction, then double-click anywhere in the interaction. This launches the interaction in the eBusiness Suite application where it was created.

6. If you want to view all interactions for the party, then click **All Interactions**.

## Viewing What Marketing Activities are Targeted to Your Customer

Customers often have a wide range of promotions targeted at them at the same time but are aware of only one. Use this procedure to view the range of marketing activities targeted to your customer.

### Steps:

1. In the eBusiness Center, select an option in the View Details region corresponding to the party you want to view interactions for.
2. Select the Overview tab.
3. If no marketing activity appears in the Source Code field, enter the marketing source code associated with the call.
4. Other marketing activities are listed in the Targeted Source Codes region on the left side of the tab. If you want to view the details of any of the marketing activities in this list, then select the activity and click **Details**.

## Viewing an Organization's Products Under Service Contracts

Use this procedure to view the installed base of products under service contracts at an organization.

## Prerequisites

- You must display either the organization or a contact at the organization in the eBusiness Center header.

### Steps:

1. In the View Details region of the eBusiness Center region, select the name of the organization.

**Note:** This option is unavailable if the header displays information on a consumer (the party type of Person).

2. Select the Install Base tab.

## Viewing Contracts a Customer Has with Your Organization

You can view contracts for a customer if you are using the Oracle Contracts applications.

Note that you can view lists of all sales contracts, blanket sales agreements, and service contracts, but that your access to contract items for these contracts is restricted by your accessible operating units. Your access to lists of lease contracts, and their details is also restricted by your accessible operating units.

## Prerequisites

- Display the party in the eBusiness Center header.

### Steps:

1. If you want to view the accounts of a consumer, then, in the View Details region, select the person's name.
2. If you want to view accounts for an organization, then select the name of the organization.
3. If you want to view information about a specific account, then select the account in the header and select the account in the View Details region.
4. Select the Contracttab.  
The tab displays the contracts in a dynamic table.
5. Select the contract category you want to view.

6. If you want to view the details of a contract, then select the contract and click **Details**.

## Viewing Accounts a Customer Has with Your Organization

Use this procedure to view information about accounts your customer has with your organization.

This information comes directly from Oracle Receivables. See Oracle Receivables documentation for an understanding of the terms and fields in this tab.

### Prerequisites

- Display the party in the eBusiness Center header.

#### Steps:

1. If you want to view the accounts of a consumer, then, in the View Details region, select the person's name.
2. If you want to view accounts for an organization, then select the name of the organization.
3. If you want to view information about a specific account, then select the account in the header and select the account in the View Details region.
4. Select the Accounttab.
5. If you want to view the details of an account, then:
  1. Select the account in the table.
  2. Click **Details**.

## Sending an E-mail to a Customer

If you have implemented Oracle Email Center you can use it to send an e-mail from Oracle TeleSales.

#### Navigation

Navigator > eBusiness Center

Navigator > Lead Center

Navigator > Opportunity Center

## Prerequisites

- You must be assigned the Email Center role.

### Steps:

1. Display a party in the eBusiness Center, Lead Center, or Opportunity Center.
2. Double-click the customer's e-mail address.
3. Enter your message information and send the message.

The message is recorded as an interaction.

## Using the Collection Tab

Use the Collection tab to view overdue balances, payment information, aging, and delinquent invoice information. This tab displays collection information belonging to your accessible operating units.

If you view an organization or a contact at an organization, then the delinquency information is for the organization account. To see delinquency information for a person, you must view that person as a consumer, not as a contact.

Clicking **Details** launches Oracle Advanced Collections where more collection functionality is available. See the *Oracle Advanced Collections User Guide* for more information.

## Creating a Quick Service Request

Use this procedure to create a service request for your customer on the Service Request tab of the eBusiness Center.

## Prerequisites

- Display the party in the eBusiness Center header.
- Oracle Service must be implemented.

### Steps:

1. In the View Details region, select the party for the service request. For example, if you are entering a service request for a consumer, then select the individual's name. If you are entering the request for an organization, then select the name of the organization.

**Note:** Some of the options are unavailable depending on the party displayed in the header.

2. Select the Service Request tab.
3. Enter information per the *Oracle TeleService User Guide*.
4. If you want to open the Service Request window to enter more detail information, click **Details**.

## Recording Your Interactions with a Customer

Use this procedure to start recording interactions with a customer. You can start another interaction simultaneously while the first one is open. One Center can track only one interaction at a time, but you can open multiple centers and start an interaction in each one.

### Navigation

Navigator > eBusiness Center

Navigator > Lead Center

Navigator > Opportunity Center

## Prerequisites

- Display the customer in the eBusiness Center or the At A Glance window, a lead in the Lead Center, or an opportunity in the Opportunity Center. Interactions can be recorded at the organization level. For the Lead Center and Opportunity Center they can also be recorded at the party relationship level.

### Steps:

1. Choose Start Interaction from the Tools menu or click the Start Interaction button on the Toolbar

**Note:** If the Start Interaction selection is disabled, this means that you are already recording your interaction.

Your interactions with this customer are recorded until you terminate the recording process by clicking **Wrap-Up** in the toolbar or on the Tools menu or **Next Call** in the eBusiness Center header.

## Wrapping Up an Interaction with a Customer

Use this procedure to stop recording your interactions with a customer and to enter information about the outcome of your interactions. Interactions are generally recorded at the organization level. However, when you invoke interaction wrap up from the eBusiness Center, Lead Center and Opportunity Center, interactions can be recorded at the party relationship level. Note that party level interactions recorded in the Lead Center and Opportunity center can be recorded only manually, not automatically. See your administrator to enable this interaction functionality for the Lead and Opportunity Centers.

### Navigation

Navigator > eBusiness Center

Navigator > Lead Center

Navigator > Opportunity Center

## Prerequisites

- Display the customer in the eBusiness Center or the At A Glance window, a lead in the Lead Center, or an opportunity in the Opportunity Center.

### Steps:

1. Choose End Interaction from the Tools menu or click the Wrap-Up button on the Toolbar. The Interaction Wrap Up window displays the current interaction and a list of the interactions you have had with the customer.
2. If you have more than one interaction open, then select the correct interaction from the Customer drop down list.
3. Use the Outcome List of Values (LOV) to select an outcome for the interaction.
4. Enter the contact for the interaction.
5. Optionally, use the Result and Reason LOV to record more details about the activity.
6. Optionally, you can also record the outcomes, results, and reasons for each individual activity recorded.
7. Optionally, enter a note for the interaction.
8. If you are using Oracle Advanced Inbound or Oracle Advanced Outbound, then you can review your call statistics. (See Viewing Call Statistics, page 10-11 for more information.)



9. If you are using Oracle Advanced Outbound and you want to schedule a call back, then refer to Rescheduling an Outbound Call, page 10-11 and follow the procedure.
10. If you want to create a task, select Create Task and enter the task information.
11. Click **End Interaction** or **Next Call** when you are done.

The information you entered is saved.

## Restrictions

If one interaction starts in one Center and moves to another Center (for example, it starts in eBusiness Center and moves to an Opportunity Center), then when it is ended in one Center it also ends in the other Center.

If you log on as a different user and select a different responsibility, then the interaction closes automatically.

If the interaction relates to a selected campaign source code, then the Outcome LOV contains possible outcomes for the campaign plus outcomes not associated to a campaign.

Combinations of outcome, results, and reason are set up by the Oracle Interaction Center administrator and control the options available in the LOVs. The administrator can also set up default information that appears in the wrap up window. You can accept the defaults or change the information.

If you click Next Call in the eBusiness Center header, then the interaction wraps up automatically with default information.

The note is related to the party in the interaction. If a lead or opportunity was created during the interaction, then the note is also related to that lead or opportunity.

## Restricting Interactions

Use this procedure to restrict your organization's interactions through e-mail or phone with organizational contacts or consumers. You might want to use this procedure if a contact is away on vacation, for example, or does not want to be contacted by telephone. The restrictions you place are for information only and must be enforced by your organizational procedures.

## Prerequisites

- Display the organizational contact or consumer in the eBusiness Center header.

### Steps:

1. In the View Details region, select the name of the person and the organization for a

contact or the name of the person for a consumer.

2. Select the Person tab.
3. Click **Restrictions**.
4. Enter the restrictions on your company's interaction with the contact. For each restriction:
  1. Use the Restriction Type LOV to specify the type of contact you want to restrict.
  2. Enter a period for the restriction. If you do not enter an end date, then the restriction remains in effect indefinitely.
  3. Use the Reason LOV to enter a reason.
5. Click **OK** .

---

## Inbound and Outbound Calling

This chapter covers the following topics:

- Overview of Inbound and Outbound Calling
- Taking Inbound Calls
- Using Next Call and Wrapup Features
- Multiple Interactions on One Call
- Transferring a Call to Another Agent
- Handling a Call With No Interaction
- Placing an Outbound Call
- Rescheduling an Outbound Call
- Viewing Call Statistics

### Overview of Inbound and Outbound Calling

**Note:** Your organization might have elected to implement a third-party tool to replace Oracle Advanced Inbound. In that case, see your administrator or the documentation for that tool for more information.

When a call comes in from a customer, the customer information automatically appears for the agent taking the call. The system can match information based on any one of the following:

- ANI (automatic number Identification)
- Party Number
- Collateral Request Number

- Event Confirmation Number
- Account Number
- Marketing PIN Number

If no exact match is found, or if there are multiple matches such as several contacts available for the customer, then a list of possible matches appears and the agent selects the correct one.

If the Account Number has roles associated with it, then the account lookup is automatically launched and displays the owner and the roles associated with the account. The selected party and account from the lookup results is then queried in the eBusiness Center. If no roles exist for the account, then the eBusiness Center is directly launched from the incoming call and populated with the party information that owns the account.

One eBusiness Center is dedicated to media (inbound calls) only and is so labeled. You cannot perform non-media work using this eBusiness Center. The non-media eBusiness Center is used for non-media activities or to accept a second inbound call received at your direct extension, not through Advanced Inbound.

The eBusiness Center toolbar contains call-related icons. They include Next Call and a link to launch the soft phone Interaction Center controller.

Your system can be set up to work with a third party softphone or using the teleset without a softphone for both inbound and outbound calls. You cannot use both the teleset and the softphone interchangeably.

In the outbound mode, an agent has the ability to navigate between each call by automatically getting the next call in the eBusiness Center when the previous call ends. From the wrap-up window the agent can also reschedule or recycle the call back at a specified time and date into the outbound list.

One agent can transfer a call to another agent if selected. Now both agents can see the same information and discuss the transfer.

## Taking Inbound Calls

Use this procedure to start your inbound call queue and take calls.

### Prerequisites

- Oracle Advanced Inbound is implemented.

### Steps:

1. In the eBusiness Center, click the Universal Work Queue icon.

The Universal Work Queue login opens.

2. Enter your login information. If you are using the softphone, then enter your extension number.

The Interaction Center Controller appears.

3. Select an inbound queue.

4. Click **Get Work**.

If the inbound information for the first call matches existing information exactly, then the correct customer information appears in the eBusiness Center and the interaction starts.

If the information for the first call has more than one match, then a list of possible matches appears.

5. If there is more than one match to the inbound call information, then select the correct customer from the list and click **OK**.

The customer information appears in the eBusiness Center and the interaction starts.

6. If there is no match to the inbound call information, then the eBusiness Center window opens and Universal Search appears. Search for the customer.

7. Take the call.

8. Enter appropriate information relating to the call such as notes or lead information.

9. If you want to enter interaction wrap-up information, then perform the following steps:

1. Click the Wrap-Up button on the toolbar.

The Interaction Wrap-up screen appears.

2. Enter the information.

3. Click **Next Call**.

10. If you want to end the interaction automatically using default values, then click the **Next Call** icon in the eBusiness Center.

## Using Next Call and Wrapup Features

The availability of the Next Call and Wrapup icons and how the Wrapup window functions depend upon your implementation and the call situation. For example,

automatic wrap up can be enabled by your administrator. The following are several scenarios and how the features apply in each scenario. A Solicited call is a call through the Advanced Inbound Queue that the agent requests by clicking Get Work in the Universal Work Queue. An unsolicited call is a transferred call or a call to the agent's direct extension.

## Scenario 1: Solicited Media, Auto Wrapup

The following table shows the details for scenario 1:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	Yes
Queue Call (solicited media)	Yes
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

### Icons in eBusiness Center

**Next Call:** Wraps up interaction automatically with default information, ends media, unblocks UWQ, and gets next call

**Wrapup:** Opens the wrap up screen

### Buttons in Wrapup Window

**Next Call:** Wraps up interaction with default outcome, ends media, and gets next call

**Cancel:** Cancels the wrap up and returns to previous screen

**End Interaction:** Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another.

## Scenario 2: Solicited Media, No Auto Wrapup

The following table shows the details for scenario 2:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	No
Queue Call (solicited media)	Yes
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

#### Icons in eBusiness Center

**Wrapup:** Opens the wrap up screen

#### Buttons in Wrapup Window

**Next Call:** Wraps up interaction with default outcome, ends media, and gets next call

**Cancel:** Cancels the wrap up and returns to previous screen

**End Interaction:** Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not go to the next call. Provides choice of options to receive next call, end call, or find another.

### Scenario 3: Unsolicited Media, Auto Wrapup

The following table shows the details for scenario 3:

Scenario	Setting
CTI Enabled	Yes
Auto Wrapup	Yes
Queue Call (solicited media)	No, unsolicited media
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

#### Icons in eBusiness Center

**Next Call:** Ends media, blocks Universal Work Queue, and does not get next call. If the

agent was already available for a solicited call at the time of the unsolicited call, then the agent will be set available for next call.

**Wrapup:** Opens the wrap up screen

#### **Buttons in Wrapup Window**

**Next Call:** Wraps up interaction with default outcome, ends media, blocks Universal Work Queue, and does not get next call. If the agent was already available for a solicited call at the time of the unsolicited call, then the agent will be set available for next call.

**Cancel:** Cancels the wrap up and returns to previous screen

**End Interaction:** Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another.

### **Scenario 4: Unsolicited Media, No Auto Wrapup**

The following table shows the details for scenario 4:

<b>Scenario</b>	<b>Setting</b>
CTI Enabled	Yes
Auto Wrapup	No
Queue Call (solicited media)	No, unsolicited media
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

#### **Icons in eBusiness Center**

**Wrapup:** Opens the wrap up screen

#### **Buttons in Wrapup Window**

**Next Call:** Wraps up interaction with default outcome, ends media, and gets next call

**Cancel:** Cancels the wrap up and returns to previous screen

**End Interaction:** Saves outcome, reason, result, and does not end media. Blocks Universal Work Queue and does not get next call. Provides choice of options to receive next call, end call, or find another.

### **Scenario 5: Wrong Number, Solicited Media**

The following table shows the details for scenario 5:



<b>Scenario</b>	<b>Setting</b>
CTI Enabled	Yes
Auto Wrapup	Yes or No
Queue Call (solicited media)	Yes
Interaction started	No
Party Displayed in eBusiness Center	No (for example, wrong number)

#### **Icons in eBusiness Center**

**Next Call:** Ends media, unblocks UWQ, and gets next call

### **Scenario 6: Wrong Number, Unsolicited Media**

The following table shows the details for scenario 6:

<b>Scenario</b>	<b>Setting</b>
CTI Enabled	Yes
Auto Wrapup	Yes or No
Queue Call (solicited media)	No, unsolicited media
Interaction started	Yes
Party Displayed in eBusiness Center	No (for example, wrong number)

#### **Icons in eBusiness Center**

**Next Call:** Ends media, leaves UWQ blocked, and does not get next call

### **Scenario 7: No CTI**

The following table shows the details for scenario 7:

<b>Scenario</b>	<b>Setting</b>
CTI Enabled	No
Auto Wrapup	Yes or No
Queue Call (solicited media)	N/A
Interaction started	Yes
Party Displayed in eBusiness Center	Yes

**Icons in eBusiness Center**

**Wrapup:** Opens the wrap up screen

**Buttons in Wrapup Window**

**Cancel:** Cancels the wrap up and returns to previous screen

**End Interaction:** Saves outcome, reason, and result

**Scenario 8: No CTI and No Party**

The following table shows the details for scenario 6:

<b>Scenario</b>	<b>Setting</b>
CTI Enabled	No
Auto Wrapup	Yes or No
Queue Call (solicited media)	N/A
Interaction started	No
Party Displayed in eBusiness Center	No

**Icons in eBusiness Center**

None

**Buttons in Wrapup Window**

Not Applicable

## Multiple Interactions on One Call

Use this procedure to wrap up the current interaction and query another party without ending the current call. You can query another party if for some reason two customers call in on one call, or if the initial was an incorrect party and you must re-query a customer.

### Prerequisites

- You have taken an inbound call or placed an outbound call

#### Steps:

1. In the eBusiness Center, click the Wrap-Up button on the toolbar.  
The Interaction Wrap-up screen appears.

2. Enter the information.

3. Click **End Interaction**.

You can now query another customer while remaining on the call.

## Transferring a Call to Another Agent

Use this procedure to transfer a call to another agent.

### Prerequisites

- You have taken an inbound call or placed an outbound call.

#### To transfer using the softphone:

1. Place the customer on hold.

2. Select the Soft Phone icon in the eBusiness Center and call the other agent using the soft phone.

The Interaction Center Work Controller appears for the second agent.

3. The second agent accepts the call.

The data transfer begins. The transfer begins while the agents speak to each other before the final click of the transfer. The agent sees the customer information including the selected campaign and any changes made by the first agent.

4. Transfer the call.

#### **To transfer using the teleset:**

1. Conference or transfer the customer to another agent using the teleset.
2. The agent reviews the screen pop about the customer. The screen contains the original call data. It does not include information changed by the transferring agent.

## **Handling a Call With No Interaction**

Use this procedure when you do not want to record an interaction for a phone call. For example, the call is a wrong number or the caller was calling for some quick information such as directions.

### **Prerequisites**

- You have taken an inbound call from someone who was not matched in your database.

#### **Steps:**

1. If partial matches display, do not select one but instead click **Cancel**.
2. If Universal Search appeared, then it disappears when the customer hangs up.
3. Click the Next Call icon. (The icon is active because no interaction was started.)  
No interaction was started or recorded.

### **Restrictions**

If you want to track interactions for bad calls, then you can set up a dummy customer to assign bad calls to and follow the normal Inbound scenario.

## **Placing an Outbound Call**

You can place an Outbound call using any of these methods:

- Universal Work Queue > Get Work
- Universal Work Queue > click on telephone number to dial
- Softphone > IC Work controller (if Softphone is enabled)

- Click the phone number in the application. You must have the softphone running.

## Rescheduling an Outbound Call

Use this procedure to reschedule an outbound call.

### Prerequisites

- You have made an outbound call

#### Steps:

1. In the eBusiness Center, click the Wrap-Up button on the toolbar.  
The Interaction Wrap-up screen appears.
2. For the interaction Result, choose **Call Back**.
3. In the Follow Up Action area, enter the date and time for the Reschedule.
4. Click either **End Interaction** or **Next Call** to save the interaction.

## Viewing Call Statistics

The Interaction Wrap Up window displays your call statistics for either inbound or outbound calls.

### Prerequisites

- You are actively in inbound or outbound mode

#### Steps:

1. In the eBusiness Center, click the **Wrap-Up** button on the toolbar.  
The Interaction Wrap-up screen displays the following call statistics for either inbound or outbound, depending upon which mode you are currently in.
  - **Talk Time:** This is real time hours, minutes, and seconds for the current call. It is call time minus wrap-up time.
  - **Average Talk Time:** This is your average talk time per call. The calculation is updated when a concurrent program is run.
  - **Average Wrap Up Time:** Wrap up time is the time between when the customer

hangs up and when you end the interaction. Total wrap up time is divided by the number of calls taken to calculate the average. The calculation is updated when a concurrent program is run.

- **Number of Calls Taken:** This is a real time daily total number of calls you have taken for the day.

---

## Enrolling in Marketing Events

This chapter covers the following topics:

- Overview of Events
- Displaying an Event in the Event Tab
- Creating an Order to Enroll Individuals in Events
- Completing the Enrollment Process for an Order
- Viewing Detailed Event Information
- Viewing the Event Roster and Enrollment Status
- Recording Attendance at an Event
- Viewing Enrollment History and Status
- Adjusting Enrollment by Canceling, Transferring, and Substituting

### Overview of Events

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. Events can be stand alone or part of a marketing campaign. See the *Oracle Marketing User Guide* for more information about events.

When you enroll an individual in an unpaid event that has space available, you receive a confirmation number for that enrollment. If the event is full and has wait list set up and you try to enroll more attendees than the number of available spots, any individuals not registered are automatically wait listed. The wait list is kept on a first come first served basis. An event that is set up with no specified number of maximum registrants accepts an unlimited number of registrations.

### Displaying an Event in the Event Tab

Use this procedure to display in the eBusiness Center Event tab an event that is not already in the order you are creating. If you want to display an event already in the

order, then instead use the Added to Order arrow buttons at the top of the tab to navigate to it.

**Steps:**

1. Navigate to the Event tab.
2. In the Name field, search for an event name using the LOV.
3. If you want to view enrollment, availability, and other information about the event, then click **Details**.

## Creating an Order to Enroll Individuals in Events

Use this procedure to create an order to enroll one or more individuals in one or more events. In one order, all enrollees must have a relationship set up in the database to the party displayed in the eBusiness Center header. For business contacts, this means all must belong to the same organization.

**Steps:**

1. If you are enrolling consumers, then, In the View Details region, select the name of the consumer.
2. If you are enrolling contacts at an organization, then, In the View Details region, select the name of the person and the organization. If this option is unavailable, you can also enroll contacts with the organization name selected.
3. Select the Event tab.
4. The Event tab automatically displays the name of the person displayed in the eBusiness Center header as the first enrollee. If you do not want to enroll this person, then you can select a different individual, provided the organization is selected in View Details.
5. Making an entry in the Source Code field narrows down the list of events that appears in the Event Name LOV. By leaving this field blank you can access all events regardless of source code, but you must enter at least one source code before you can complete the order. You can order events associated with multiple source codes in the same order.
6. Select the event collateral you want to send to this enrollee. You can send enrollees event collateral that belongs to any of your accessible operating units. Depending on system settings, if you attempt to send collateral that does not belong to one of your accessible operating units, you will receive this message:

*The collateral associated with the selected event does not belong to your accessible Operating*



*Unit(s). Please select a different event.*

1. Select the Select check box next to the item you want to send.
  2. If you are sending physical collateral you might be able to select an alternate shipping method using the Shipping Method List of Values (LOV).
  3. If you want to send the collateral item to a different destination than the one displayed in the Send to field, then select it using the LOV.
- 
7. For each enrollee you want to add, perform the following steps:
    1. Use the Enrollee Name List of Values (LOV) to enter the name.
    2. Select the check boxes for the collateral you want this enrollee to receive.
    3. If you are sending physical collateral, then you might be able to select alternate shipping methods.
  8. Click **Add to Order**.
  9. After you have completed adding events to your order, you must click **Review Order** to complete the enrollment, page 11-3 and send out confirmation e-mails.

## Restrictions

You can enroll multiple consumers and organizational contacts in multiple events in a single order, but all recipients must be entered in the database and have established relationships with the party displayed in the eBusiness Center header.

This means that in any single order you can only enroll contacts at the same organization or, if you are enrolling consumers, you can enroll only individuals who have established relationships with the consumer displayed in the eBusiness Center header.

For example, if John Smith calls in and wants five friends enrolled in an event, these five friends must be entered into the database first and have relationships to John Smith recorded using the Relationship tab.

If the enrollees are not in the database or you do not know who they are, then you can enroll one contact multiple times to hold spaces for the others.

## Completing the Enrollment Process for an Order

Use this procedure to confirm an order to enroll individuals in events.

## Prerequisites

- You must first create the enrollment order on the Event tab of the eBusiness Center, page 11-2.

### Steps:

1. In the Event tab of the eBusiness Center, click **Review Order**.

**Note:** If the Review Order button is disabled, this means that you have not added any events to the order.

The Event Registration Review window lists the events and enrollees for your order and their status.

2. Click **Enroll**.

The application adds the confirmation number and enrollment status to the enrollee information in the list.

## Viewing Detailed Event Information

Use this procedure to view detailed information about an event such as the agenda of the event, hotel and venue information, and directions. What information you can view depends on the information entered in Oracle Marketing.

### Steps:

1. With the event displayed in the Event tab, click **Details**.

The Event Details window appears.

2. From the View By drop-down list, select **Information**.

The Available Event Information window displays available types of information.

3. Select the type of information you want to view to display it in the Description text box.

4. Click **OK** or **Cancel** to exit.

## Viewing the Event Roster and Enrollment Status

Use this procedure to view who is enrolled for an event and the status of their enrollment.

**Steps:**

1. With the event displayed in the Event tab, click **Details**.  
The Event Details window appears.
2. From the View By drop-down list, select Roster.  
The window displays the list of enrollees with enrollment status, confirmation code for each.
3. Click **OK** or **Cancel** to exit.

## Recording Attendance at an Event

Use this procedure to add information about whether an enrollee attended the event.

**Steps:**

1. With the event displayed in the Event tab, click **Details**.  
The Event Details window appears.
2. Select Roster from the View By drop-down list.
3. For each event enrollee whose attendance you want to record:
  1. Select the enrollees in the list. You can select multiple enrollees using the shift or CTRL keys on your keyboard.
  2. In the Update Roster region at the bottom of the window, use the Attended List of Values (LOV) to select Y (Yes) or N (No).
  3. Using Source LOV, select who enrolled the individual.
4. Click **Update**.

## Viewing Enrollment History and Status

Use this procedure to view the enrollment history and status for a consumer, a contact at an organization, or for all the organization as a whole.

**Note:** You cannot view information relating to payments for events.

## Steps:

1. Select the appropriate View Details.

2. From the Navigate To menu, select **Event Registration History**.

The Registration History window appears showing the enrollment history for the individual or organization you selected in View Details.

If you are viewing enrollment for a consumer, then the Customer field displays the name of the consumer and the Enrollee List of Values (LOV) contains the names of all of the individuals in the database that have an established relation with that consumer, if any.

If you are viewing enrollment history for an organization or for contacts at an organization, then the Customer field displays the name of the organization and you can use the Enrollee LOV to select any of the contacts at that organization.

3. If you want to view all of the enrollments for an organization, then make sure the Enrollee field is blank. If it is not, then clear the field by clicking **Clear Record** on the toolbar.
4. If you want to view the enrollment history for a contact at an organization, then select the contact using the Enrollee LOV.
5. If you want to view enrollment history for a consumer, then select the name of the consumer using the Enrollee LOV.

6. Click **Find..**

The window displays the enrollee history for the party you selected. Each line represents one enrollment.

The Primary Contact field displays the party which was displayed in the eBusiness Center header at the time the order was made.

7. Select the historical period you want to view using the View List drop-down list.
8. Select an enrollment line to view its status and other details in the Enrollee Information region.

An Enrollee Status of Registered means the individual is registered for the event. If the event requires payment, then the payment has been confirmed.

The Primary Contact field displays the party who made the enrollment order. The Enrollee Name displays the actual person enrolled.

9. If you want to adjust any enrollment, then:
  1. Select the enrollment line you want to adjust.

2. Click **Adjust Enrollment** and follow the procedure described in Adjusting Enrollment by Cancelling, Transferring, and Substituting., page 11-7
  
10. Click **Cancel** when you are done reviewing event history.

## Adjusting Enrollment by Canceling, Transferring, and Substituting

Use this procedure to adjust enrollment by cancelling the enrollment, transferring the enrollment to a different individual, or by substituting a different enrollee.

**Note:** For paid events, adjusting an enrollment by canceling, transferring or substituting does not adjust the original payment for the enrollment.

### Navigation

Navigator > eBusiness Center > Event > Navigate To > Event Registration History

### Steps:

1. View the enrollment history for the individual whose enrollment you want to , page 11-5adjust.
2. In the Event window, Select the enrollment line you want to adjust.
3. Click **Adjust Enrollment**.  
The Adjust Enrollment window appears.
4. If you want to cancel the enrollment, then:
  1. Select the **Cancel** radio button.
  2. Select a reason from the Cancellation Reason drop-down list.
5. If you want to transfer the enrollment of this individual to another event, then
  1. Select the **Transfer** radio button.
  2. Use the Event Name List of Values (LOV) to select an alternate event.
6. If you want to substitute a different individual as the enrollee, then:
  1. Select the **Substitute** radio button.
  2. Select the name of the substitute using the Enrollee Name LOV.

7. Click **OK**.

---

## Sending Collateral

This chapter covers the following topics:

- Overview of Sending Collateral
- Preparing a Collateral Order for One or More Recipients
- Modifying a Collateral Order
- Viewing Collateral Order History and Order Status

### Overview of Sending Collateral

You can use Oracle TeleSales to create an order for sending electronic or physical collateral to prospects or customers.

Electronic collateral consists of a cover letter and the electronic files of the collateral itself. Both are created within Oracle Marketing and sent to customers through Oracle Fulfillment, a module of the Oracle CRM eBusiness Suite. You can choose to send the cover letter, the collateral, or both. Electronic collateral can be sent by fax, by e-mail, or to print.

Physical collateral is tracked in Oracle Inventory and shipped through Oracle Order Management. It can be created either in Oracle Marketing or in Oracle Inventory.

Electronic collateral can be grouped into kits in Oracle Marketing. When an order containing a kit is processed, all items in the kit are sent.

You cannot use Oracle TeleSales to process payment for either type of collateral you send to customers.

The order you create in the Collateral tab of the eBusiness Center is executed through an e-mail server, a fax server, or a printer in the case of electronic collateral or through the shipment of one or more inventory items. You must check the Collateral History window available from the Actions menu to see whether the collateral has actually been sent out and delivered.

Sending collateral to prospects and customers is a two-step process. You use the

Collateral Tab of the eBusiness Center to create the order and then confirm it in a separate window before it can be fulfilled.

Confirming the order requests the collateral to be sent. It is up to the different fulfillment services to ensure that collateral is actually delivered.

Information about the recipients and the collateral you want to send must already be in the database. For electronic collateral, the database must have the collateral file itself.

For example, before you can create an order for prospects to receive an e-mail about a new product, your database must already contain the e-mail and the recipient information, including e-mail addresses.

## Preparing a Collateral Order for One or More Recipients

You can fax or e-mail a cover letter to a customer with or without soft collateral, or print it. You can also send soft collateral without a cover letter. Hard collateral is mailed to the customer. Use this procedure to prepare an order to send cover letters and collateral to consumers or organizational contacts related to the party in the eBusiness Center header.

While you can select multiple recipients for each piece of collateral in the order, the choice of recipients is restricted by the party you are viewing in the eBusiness Center header and the View Details you have selected:

- If you request collateral to be sent to consumers, you can only select the consumer as the recipient.
- If you send the collateral to contacts at an organization, then you can only select recipients who are contacts at that one organization.
- If in View Details you selected a contact, then only that contact appears as a recipient.
- If in View Details you selected the organization, then you can choose any organization contact as the recipient.

### Prerequisites

- Display the party in the eBusiness Center header.
- Information about the recipients and the collateral you want to send must already be in the database. For electronic collateral, the database must have the collateral file itself.

### Steps:

1. If you are sending collateral or a cover letter to a consumer, then, in the View



Details region, select the name of the consumer.

2. If you want to send collateral or a cover letter to one or more recipients at an organization, then, in the View Details region, select either the name of the organization or the organizational contact.

**Note:** You are restricted to sending collateral to one organization in any one order.

3. Select the Collateral tab.
4. If you are sending electronically, then optionally select a cover letter from the Cover Letter LOV. You can send a separate cover letter with each piece of collateral or send the cover letter without collateral. A cover letter is not required.
5. Making an entry in the Source Code field narrows down the list of collateral that appears in the Collateral Name LOV. By leaving this field blank you can access all collateral regardless of source code, but you must enter at least one source code before you can complete the order. You can order collateral associated with multiple source codes in the same order.

6. If you want to send collateral, then select the collateral by performing the following steps:

1. If you know the source code the collateral is associated with, then select a source code using the Source Code List of Values (LOV) in the Select Collateral region of the Collateral tab.

The source code is populated if you made an entry in the Overview tab.

Selecting a source code restricts the number of collateral available in the Collateral Name LOV.

2. If you know the name of the collateral that you want to send, then use the Collateral Name LOV to select it. If you select the collateral first, the related source code appears. Only collateral with the status Final Loaded display in the LOV.

3. If you do not know the collateral name you want to send, then click **Search** and search for it.

The Select Collateral region displays basic information about the collateral.

4. If the collateral is a kit, then Yes appears in the Kit field and you can review the items in the kit by clicking **Review Kit**.

A list of items in the kit appears.

7. Review the recipient name and optionally select a different recipient from the LOV.

**Note:** If the recipient is not listed in the LOV and you are viewing details for the organization, then create the contact by selecting New Contact from the Navigate To menu.

8. If you are sending physical collateral to this recipient, then enter the quantity you want to send. Your organization's preferred shipping method is filled in automatically. You can use the Shipping method LOV to select an alternate shipping method.

9. Depending on the type of shipping method you select, the individual's address appears automatically in the Sent to field. You can select an alternate destination using the Sent to LOV.

**Note:** If the LOV contains incorrect information or no address or e-mail appears, then you must enter the correct information on other tabs of the eBusiness Center.

10. If you are viewing details for the organization, then optionally select any additional recipients and, for physical collateral, the number of copies they are to receive.

11. Click **Add to Order**.

12. If you want to add additional items to the collateral order, then select **New** from the File menu and repeat from step 4.

13. When you complete adding collateral items, cover letters, and recipients, click **Review Order** and complete the order creation procedure by clicking **Send Request**. You must complete this last step for your order to be processed.

The collateral order is processed on a schedule set up by your organization.

You can check if the collateral order is fulfilled by choosing **Collateral History** from the Navigate To menu.

## Restrictions

Quantity Available and Back Order fields in the Select Collateral region are reserved for future functionality.

After you confirm an order by clicking the Send Request button on the Collateral Request Confirmation window, you cannot modify it.

You can send collateral to multiple recipients in one order, but all recipients must be entered in the database and have established relationships with the individual displayed in the eBusiness Center header.

This means that in any single order you can only send collateral to contacts at the same organization or, if you are sending collateral to consumers, you can send collateral only to individuals who have established relationships with the consumer displayed in the eBusiness Center header.

For example, if John Smith calls in and wants five company brochures sent to five friends, these five friends must be entered into the database first and have relationships to John Smith recorded using the Relationship tab.

## Modifying a Collateral Order

Use this procedure to modify an order you have created.

### Prerequisites

- You must be in the process of preparing an order on the Collateral tab, page 12-2. You cannot modify an order after you have committed it using the Send Request button.

### Steps:

1. If you want to modify individual items in the order, then:
  1. Navigate to the item you want to modify using the Added to Order arrow buttons located at the top left hand side of the Collateral tab.
  2. If you want to replace this item with another, then:
    - If you know the name of the new item, then select it using the Collateral Name List of Values (LOV).

Changing the source code in the Source Code field will give you a different list of collateral to select from. Deleting any entry in the Source Code field displays all available collateral in Collateral Name LOV. Only collateral with the statuses Final Loaded or Expired display in the LOV.
    - If you do not know the name, use the search function to search for it.
  3. For physical collateral, you can modify the quantity you want to send to any recipient by entering a different quantity.
  4. You can modify the shipping method for any recipient.
  5. If you want to remove a recipient from the order, then place your cursor in the recipient's name and click **Clear Record** in the toolbar.
  6. Add any additional recipients and, for physical collateral, the number of copies

they are to receive.

2. Click **Update Order**.
3. When you have completed modifying the order, click **Review Order**.
4. Complete the order creation procedure by clicking **Send Request**. You must complete this last step for your order to be processed.

The collateral order is processed on a schedule set up by your organization.

You can check if the collateral order has been fulfilled, page 12-6 by choosing Collateral History from the Navigate To menu.

## Viewing Collateral Order History and Order Status

Use this procedure to view the status of individual collateral items in collateral orders that have been submitted for delivery.

### Prerequisites

- The concurrent program *Interaction History Bulk Process* updates the history information for collateral.

### Steps:

1. Choose **Collateral History** from the Navigate To menu.

The Collateral History window appears.

If you are viewing consumer collateral orders, then the Customer field displays the name of the consumer and the Recipient LOV contains the names of all of the individuals in the database that have an established relation with that consumer.

If you are viewing collateral orders for an organization or contacts at an organization, then the Customer field displays the name of the organization and the Recipient LOV allows you to select all contacts at that organization.

2. If you want to view all of the collateral orders for an organization then make sure the Recipient field is blank.
3. If you want to view collateral orders for a contact at an organization, then select the contact using the Recipient LOV.
4. If you want to view collateral orders for a consumer, then select the name of the consumer using the Recipient LOV.
5. Click **Display**.

The window displays a history of collateral orders made for the party.

Each line represents one collateral item and one recipient. This means that if you are sending the same item to five different individuals, this item appears listed five times with each recipient's name.

The Primary Contact field displays the party which was displayed in the eBusiness Center header at the time the order was made.

6. Select a collateral item to view more details about it in the Request Information region.
7. If an item has the Request Status of delivered, this means that the item was sent out to the recipient.
8. If the collateral is a kit, then Yes appears in the Kit field and you can review the items in the kit by clicking **Review Kit**.  
A list of items in the kit appears.
9. Click **OK** to close the window.



---

## Using Notes

This chapter covers the following topics:

- Overview of Using Notes
- Viewing and Creating Notes
- Relating a Note to Other Objects
- Searching for Text Within Notes

### Overview of Using Notes

You can use Oracle TeleSales to keep notes on customers, accounts, contacts, opportunities, tasks, interactions, and leads. Your ability to access notes is dependent on the permissions you have to access the objects the note is related to. If you do not have access to a lead, for example, you cannot view or create a note for that lead.

When you create a note, the application automatically saves information on the creator of the note, the date and time the note was created, and the context in which it was entered. When a sales representative creates a note while working an opportunity in the Opportunity Center, for example, that note is automatically related to the opportunity and can be viewed by anyone with access to that opportunity. It cannot be viewed by anyone who does not have access to the opportunity. You can also make the note private in which case it cannot be seen by anyone else.

The note owner can relate a note to multiple objects, however, making that note available to a broader audience. For example, a sales representative writing an opportunity note about a problem the customer is having with the service department might want to relate that note to the customer information. This way everyone with access to that customer can view that note, not only those who have access to the opportunity.

You can search for text within notes by displaying the list of the notes that you want to search, right-clicking in the list, and selecting Find from the pop-up window.

## Viewing and Creating Notes

You can view and create notes from several locations in Oracle TeleSales. These include:

- Universal Search window
- Note tab in the eBusiness Center, Opportunity Center and Lead Center
- Task Tab in the eBusiness Center
- Interaction Wrap Up window

### From the Universal Search Window

Search for an object, and then select the object from the list of search results. Click **View Notes**. You can change the date range for notes display, if you like, and then click **Display** to display a group of notes for another date range. Click **New** to create a new note. When you are finished, click **Save**.

### From the Note Tab

Navigate to the eBusiness, Lead, or Opportunity Center. Select the Note tab. You can change the date range for notes display, if you like, and then click **Display** to display a group of notes for another date range. Select a note to view the complete text for it. If you want to see continuous text for all of the notes, click **All Notes**, and then click **Next** to display more notes text. Click **New** to create a new note. You can mark the note as public or private, depending on the access you want to grant to the note text. If you want the note to be visible from other objects, you must relate the note to those objects. See *Relating a Note to Other Objects*, page 13-2 for more details. When you are finished, click **Save**.

### From the Task Tab

Navigate to the eBusiness, Center. Select the Task tab. You can mark the note as public or private, depending on the access you want to grant to the note text. When you are finished, click **Save**.

### From the Interaction Wrap Up Window

Enter the text into the Note text box. Click either **End Interaction** or **Next Call**. The note text is saved with the rest of your interaction.

## Relating a Note to Other Objects

Creating a note relates that note to the object where you created it. For example, a note you create on the Note tab of the Lead Center is automatically linked to the lead you are viewing. Use this procedure to relate the note to additional objects.

### Navigation

Navigator > eBusiness Center > Note



Navigator > Lead Center > Note

Navigator > Opportunity Center > Note

Navigator > Universal Search > View Notes

## Prerequisites

- You must display the note you want to relate to other objects in the Notes tab or in the View Notes window.

### Steps:

1. On the Note tab or the View Notes window, click **Related to**.
2. Use the Related to LOV to select the type of object you want to relate the note to.
3. Use the Name LOV to select the object.
  - When the type you select is Relationship, then the Name LOV contains a list of other contacts at the organization, or, for consumers, persons with a relationship to the consumer displayed in the eBusiness Center. The names are a concatenation of the contact first and last name and the organizational name, if any.
  - When the type you select is Organization, then the Name LOV contains the names of any organizations that have an established relationship with the organization or person.
  - When the type you select is Opportunity, then the Name LOV contains the names of the opportunities for the organization or consumer. The name is a free text description of the opportunity entered in the Opportunity Name field concatenated with the opportunity number.
  - When the type you select is Lead, then the Name LOV contains all the lead names for the organization or person. The lead name is the free text description of the opportunity entered in the Lead Name field.
4. Click **OK**.

## Searching for Text Within Notes

Use this procedure to find text in notes listed in a table.

## Prerequisites

- You can only perform this procedure within any table listing notes, such as the

Note table in the Overview tab of the eBusiness Center or the listing of notes in the Note window.

**Steps:**

1. Right-click any cell in the table.
2. Select **Find in Table** from the pop-up menu.
3. Type the characters you want to search on into the text field.
4. Indicate whether to match case, and select the direction of the search, backward or forward.
5. Click **Find**.

---

## Using Tasks

This chapter covers the following topics:

- Overview of Using Tasks
- Viewing Tasks for a Customer
- Creating a Task for a Customer or an Account
- Creating a Task During Interaction Wrap Up
- Creating a Task Using a Template
- Assigning Tasks for an Opportunity
- Viewing Tasks Associated with an Opportunity

### Overview of Using Tasks

Use the Task tab of the eBusiness Center to view and assign tasks pertaining to individual consumers, organizations, accounts, and organizational contacts.

A task you create here appears in the work queue of the individual you assign as the owner of the task.

Where you create a task determines how a task is categorized in the work queue. If you want to assign a task for a lead, then create the task in the Lead Center. Use the Opportunity Center to create tasks related to opportunities.

The task tab is divided into two regions. The left side presents the list of existing tasks you can view in the region to the right.

You can sort the list of tasks in the list by any column and can restrict the list to displaying only private tasks by selecting the Private check box. Selecting the Display All check box displays closed tasks in addition to open tasks.

You can use the right side of the tab to view the details of an existing task you have selected in the list or to enter a new task. To create a new task you must first click **New**.

## Viewing Tasks for a Customer

Use this procedure to view all of the tasks assigned to agents regarding a consumer, an organization, an account, or an organizational contact. If you want to view tasks assigned to you, then use the Universal Work Queue instead.

### Prerequisites

- Display the customer related to the task in the eBusiness Center header.

#### Steps:

1. In the View Details region, select the name of the consumer, organization, contact, or account.
2. Select the Task tab.
3. The tasks associated with the customer are listed on the left.
4. Select the Display All check box to list both open and closed tasks.
5. If you want to view only private tasks, then select the Private check box.
6. Select a task on the list to view its details on the right.
7. If you want to see notes for a task, then click **Task Notes**.
8. If you want to see further details, then click **Details**.

## Creating a Task for a Customer or an Account

Use this procedure to create a task for a consumer, an organization, an account, or an organizational contact. The task you create appears in the work queue of the individual you assign as the owner of the task.

If you want to assign a task for an opportunity or a lead, then create the task in the Lead or Opportunity tabs instead. Where you create a task determines how a task is categorized in the work queue.

### Prerequisites

- Display the customer you want to create a task for in the eBusiness Center header.

**Steps:**

1. In the View Details region, select the name of the consumer, organization, contact, or account.
2. In the Task tab, click **New**.
3. Use the Lists of Values (LOVs) to enter the task type and priority.
4. Enter a name for the task in the Name field.
5. Enter a status.
6. Choose a date type.
7. Optionally, enter dates in the Start and End fields.
8. Select an owner type.
9. In Owner, use the LOV to enter the person who owns this task.
10. To assign the task to one or more resources, perform the following steps:
  1. Click the ellipsis button beside the Assignee field.
  2. Select a resource type from the LOV.
  3. Select the resource from the LOV.
  4. Use the LOV to change the status of the task.
  5. If you want the task to display in the resource's calendar, select Show on Calendar.
  6. Click **OK**.  
Assignees cannot be removed after they are committed.
11. Enter a description.
12. If you want to enter notes for the task, then click **Task Notes** and enter the note.
13. If you want the task viewable only by you, then select **Private**.
14. Click **Save**.

The task appears in My Owned Tasks in Universal Work Queue for the person assigned as the owner of the task. It appears in My Assigned Tasks for each person added as an assignee. The last assigned assignee appears on the tab as Assignee. The task appears in

the calendar for each assignee who has Show on Calendar selected.

## Creating a Task During Interaction Wrap Up

Use this procedure to add a task during an interaction wrap up.

### Navigation

Navigator > eBusiness Center > Wrap Up

Navigator > Lead Center > Wrap Up

Navigator > Opportunity Center > Wrap Up

### Prerequisites

- The Interaction Wrap Up window is open.

### Steps:

1. Select **Create Task** from the Follow Up Action list.
2. Enter a name for the task.
3. Use the LOV to select a task type.
4. Enter a start date.
5. Optionally enter an end date.
6. Use the LOV to select an owner type.
7. In Owner, use the LOV to enter the person who owns this task.
8. Use the LOV to select an assignee type.
9. Select an assignee for the task.
10. Enter a description of the task.
11. Click either **End Interaction** or **Next Call**.

The interaction wrap up information and your new task are saved.

## Creating a Task Using a Template

You can create tasks using a template in the eBusiness Center, Opportunity Center, and Lead Center. The task is created for the party, account, opportunity, or lead.

## Prerequisites

- Display the party you want to create a task for in the eBusiness Center header.
- Select the account for the party in the eBusiness Center header.
- Select the opportunity in the Opportunity tab of the eBusiness Center or display it in the Opportunity Center.
- Select the lead in the Lead tab of the eBusiness Center or display it in the Lead Center.
- Templates and template groups must exist. They are created by your administrator.

### Steps:

1. If you want to create a task for a party or account, then select one of the following in the eBusiness Center:
  1. If you want to create a task for a consumer, then in the View Details region, select the name of the consumer.
  2. If you want to create a task for an organization, then in the View Details region, select the name of the organization.
  3. If you want to create a task for a contact at an organization, then in the View Details region, select the names of the contact and the organization.
  4. If you want to create a task relating to an account, then, in the View Details region, select the account.
2. From the Actions menu choose Create Task from Template.
3. Use the Lists of Values (LOVs) to select a template group.
4. Use the LOV to select an owner type. The LOV displays resources.
5. In Owner, use the LOV to enter the person who is being assigned this task.
6. Click **Create Tasks**.

The task is created and available for viewing and editing.

## Assigning Tasks for an Opportunity

Use this procedure to assign a task for an existing opportunity. The task you assign here appears on the work queue of the individual you enter as the owner of the task. This

task also remains visible in this task tab. All members of the sales team can view, create, and edit tasks.

**Steps:**

1. Display the opportunity in the Opportunity Center.
2. Select the Task tab.
3. Click **New**.
4. Use the Lists of Values (LOVs) to enter the task type and priority.
5. Enter a name.
6. Enter a date when you want this task to be performed in the planned Start field.
7. In Owner, use the LOV to enter the person who is being assigned this task.
8. Enter a description.
9. If you want the task viewable only by you, then select **Private**.
10. If you want the assignees notified about the task, then select **Notify**.
11. If you want to relate the task to other objects, then perform the following steps:
  1. Click **Related To**.

The Related To window displays relationships to the opportunity number and the party displayed in the header.
  2. Select an object type.
  3. Select the name to relate to the task.
  4. Optionally, enter a description of the task.
  5. Click **OK**.

The Related To window closes.
12. Click **Save** on the toolbar.

## Viewing Tasks Associated with an Opportunity

Use this procedure to view tasks associated with an opportunity.



**Steps:**

1. Display the opportunity in the Opportunity Center.
2. Select the Task tab.
3. If you want to see both open and closed tasks, then select **Display All**.
4. If you want to view only private tasks, then select **Private**.
5. Select a task on the list to view the details on the tab.
6. If you want to see further details, then click **Details**.



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